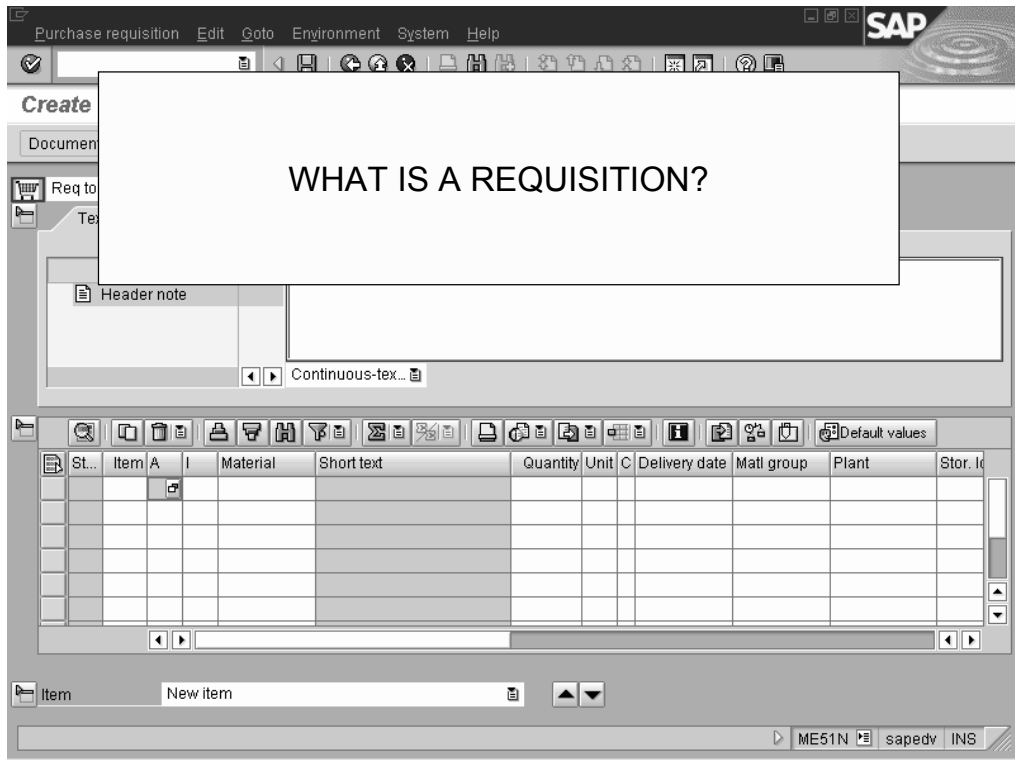




THE PROCUREMENT PROCESS REQUISITION THROUGH INVOICE VERIFICATION

Module 1 Purchase Requisition Process

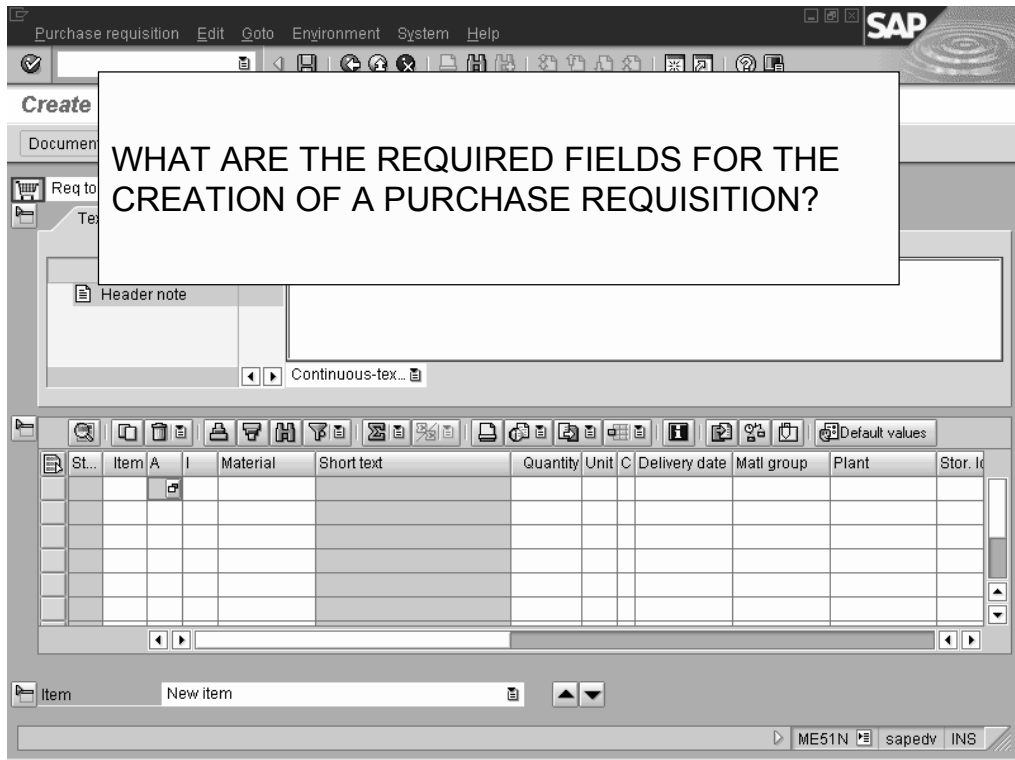


1-2

AASIS Support Center, Patricia Orr
Revised 8-01-04

The purchase requisition is the first step in the procurement process. It defines a need for a material or service. It has the following characteristics:

- It is an internal document; it is not used outside the State.
- It specifies the type of material/service and quantity to be procured from a vendor.
- When the purchase requisition has been created in AASIS, the appropriate funds are committed.
- The purchase requisition must be approved in AASIS before a purchase order can be issued.



1-3

AASIS Support Center, Patricia Orr
Revised 8-01-04

The required fields on the **item overview screen** of a purchase requisition include:

- the account assignment category field, except for stocking plants.
- the material field
- the quantity field
- the delivery date field
- the plant field
- the purchasing group field
- the requisitioner field
- the tracking number field
- the purchasing organization field

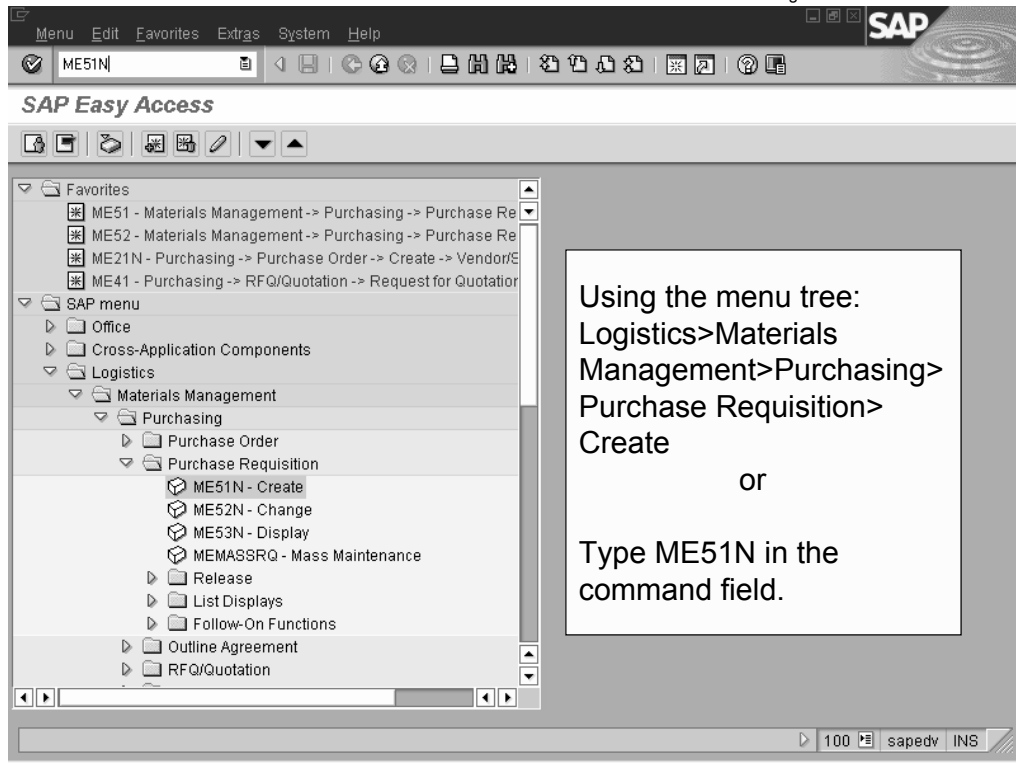
The required tabs on the **detail items tabs** of a purchase requisition include:

- the valuation tab
- the account assignment tab (for every account assignment except “U” and “blank” for plant’s stock orders).



Create a Purchase Requisition ME51N

USING THE MENU TREE GO TO
LOGISTICS>MATERIALS
MANAGEMENT>PURCHASING>
PURCHASE REQUISITION>CREATE



1-5

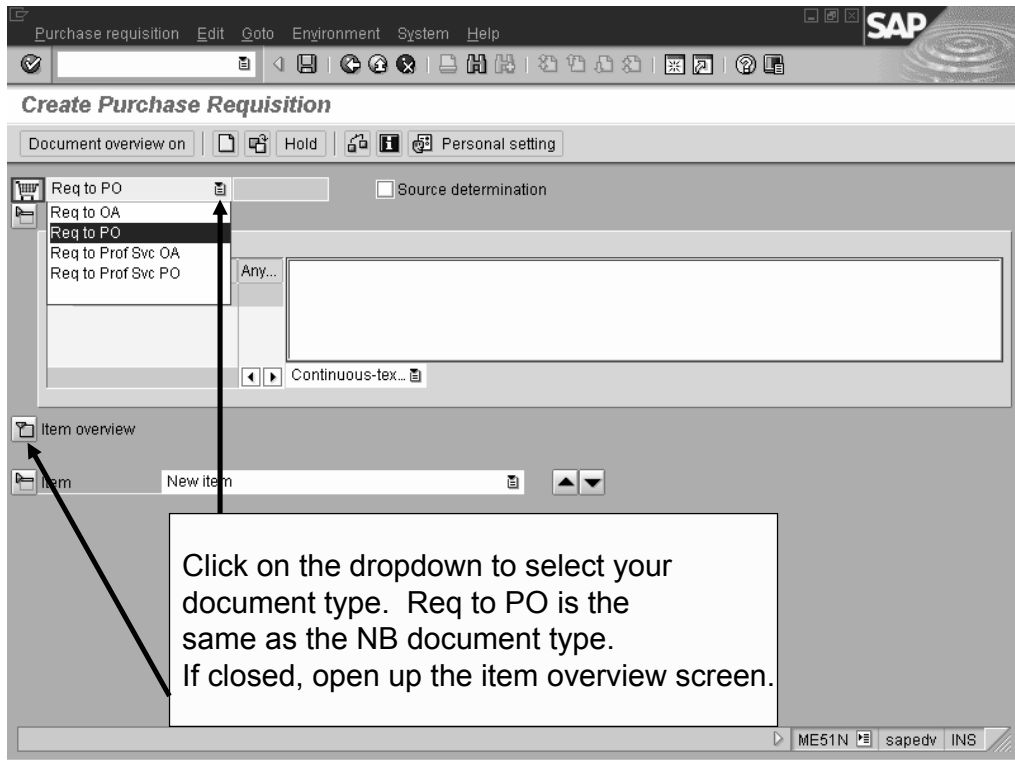
The header note text is not item specific. The text typed here pertains to the requisition as a whole. Entries in this field are not required. Additional details for the buyer or purchasing agent, pertaining to the requisition may be entered.

The header note text will not populate into the purchase order.

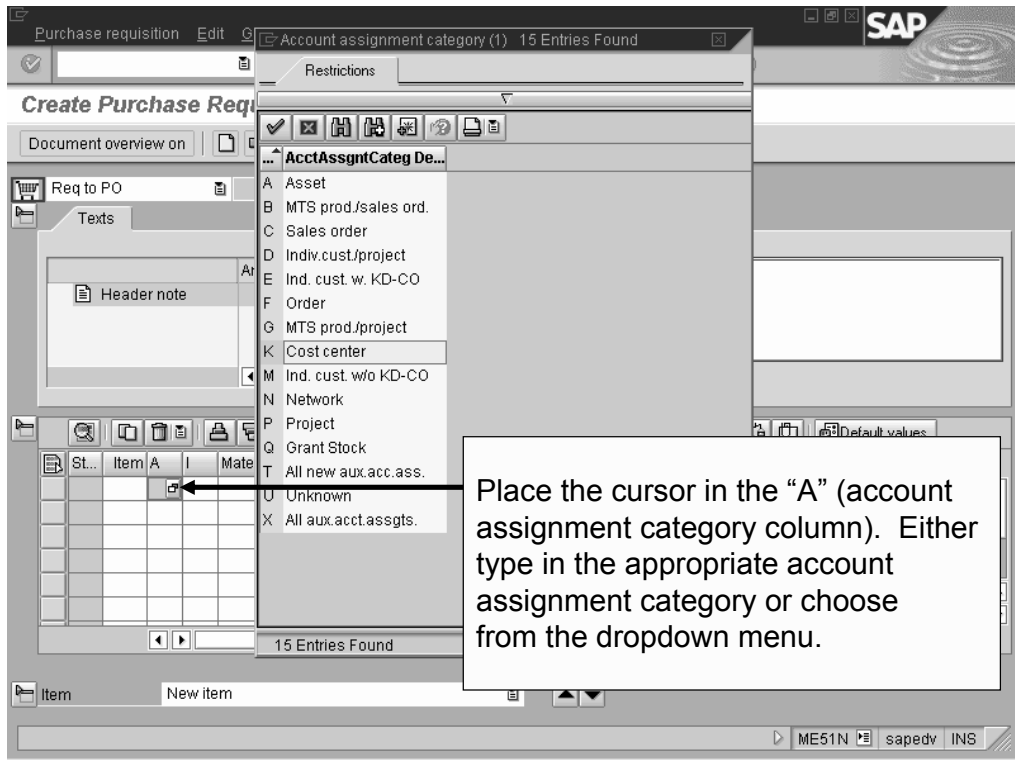
The header note text is not item specific. The text typed here pertains to the requisition as a whole. Entries in this field are not required. Additional details for the buyer or purchasing agent, pertaining to the requisition may be entered.

The header note text will not populate into the purchase order.

1-6



1-7





Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO Source determination

Texts

Header note Any... Internal IPR# 2345

Continuous-text...

St...	Item	A	I	Material	Short te
		K		10111678	

Item New item

ME51N sapadv INS

Enter the material number or click on the dropdown to do a material search. There are different search criteria that can be selected.

1-9



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO Material Number (1) Source determination

Material by task list Sales material by description Material by material type

Material Type GDSV

Material description *pencil

Language Key EN

Material

Maximum

Choose the tab "Material by material type".
In the Material Type field type or choose
from the dropdown GDSV. Using your
asterisk's as wild cards type your search
criteria in the material description field.
Click enter to continue.

Item ETR (1) (514) sapetr INS

1-10

Material Number (1) 4 Entries Found

Purchase re

Material by task list Sales material by description ☒ Material by material type

Create P

Document ov

Req to PC

Texts

He

St...

Item

Material Type: GDSV

Material description	Language	Material
PENCIL, MECHANICAL, 0.5MM EN	EN	10100243
PENCIL, MECHANICAL, 0.7MM EN	EN	10100244
PENCILS MECHANICAL	EN	10100187
PENCILS WOOD NO. 2	EN	10100186

Chose the material and highlight. Click the green check to continue.

4 Entries Found

etr INS

1-11



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO ☐ Source determination

Texts

Header note Any... Internal IPR# 2345

Continuous-text...

St...	Item	A	I	Material	Short text	Quantity	Unit
		K		10111678		50	

Item New item

ME51N sapadv INS

Enter the quantity required.

1-12



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO Source determination

Texts

Any... Internal IPR# 2345

Header note

Continuous-text...

Default values

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. l
		K		10111678		50.000		D	12/31/2003			

Item New item

ME51N sapadv INS

Enter the delivery date.
Type the date or use
the calendar by clicking
on the dropdown.

1-13



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on | Hold | Personal setting

Req to PO | ☐ Source determination

Texts

Any... Internal IPR# 2345

Header note

Continuous-text...

St... Item A I Material Short text Quantity Unit Delivery date Matl group Plant Stor. Id

St...	Item	A	I	Material	Short text	Quantity	Unit	Delivery date	Matl group	Plant	Stor. Id
			K	10111678							

Item New item

ME51N | sapedv | INS

Start | Inb... | Ma... | Mic... | SA... | Cre...

2:30 PM

Enter plant 9999 or applicable plant number. Scroll over to the purchasing group, requisitioner, tracking no., desired vendor and purchasing organization fields.

1-14

The screenshot shows the SAP 'Create Purchase Requisition' interface. At the top, there's a menu bar with 'Purchase requisition', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title 'Create Purchase Requisition' is displayed. Underneath, there's a section for 'Document overview on' with icons for 'New', 'Open', 'Hold', 'Print', and 'Personal setting'. The 'Req to PO' field is set to 'Internal IPR# 2345'. The 'Source determination' checkbox is unchecked. The 'Texts' tab is selected, showing a list of text types with 'Header note' and 'Continuous-text...' visible. Below this is a table with columns: St..., Item, Matl group, Plant, Stor. loc., PGr, Requisitionr., Tracking..., Des. vendor, Fixed vendor, POrg, and Agreement. The first row contains the values: 9999, , , 311, pnorr, TRISHA, 1000470, , 0610. A callout box with an arrow points to the 'Des. vendor' field, containing the text: 'Enter the PGr, Requisitioner, Tracking No., Des. Vendor, and POrg. To assign a source of supply instead of using the Des. Vendor field click on the source of supply icon. Hit enter to continue.'

1-15

Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on [Icons] Personal setting

Req to PO [] Source determination []

Header

St...	Item	Requisnr.	Tracking...	Des.vendor	Fixed vendor	POrg	Agreement	Item	Info record	MPN material
	10	pnorr	TRISHA	1000470...		0610				

Item [10] 10111678, PENCIL,#2,WOOD

Material data Quantities/dates Valuation Account assignment Source of supply Status Conta...

Enter Cost Center

Enter the cost center in the cost center field. If the purchase requisition contains multiple items going to the same cost center, click on the repeat icon. Once you have entered the cost center, click on the valuation tab.

1-16



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO Source determination

Header

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. l...
	10	K		10111678	PENCIL,#2,WOOD	50	EA	D	12/31/2003	OFFICE SU...	Reference Pl...	

Item [10] 10111678, PENCIL,#2,WOOD

Material data Quantities/dates Valuation Account assignment Source of supply Status Conta...

Valuation price 1.00 USD / 1 EA Total value 50.00 USD

☒ Goods receipt
☒ Invoice receipt
☐ GR non-valuated

Enter your valuation price.
Click on the Source of supply tab.

edv INS

1-17



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO ☐ Source determination

Header

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. l...
	10	K		10111678	PENCIL,#2,WOOD	50	EA	D	12/31/2003	OFFICE SU...	Reference Pl...	

Item [10] 10111678 , PENCIL,#2,WOOD

Material data Quantities/dates Valuation Account assignment Source of supply Status Conta...

Agreement ☐ Purch. Organization 0610 Order unit

Fixed vendor

Info record

Des.vendor 100047038 OFFICE DEPOT INC

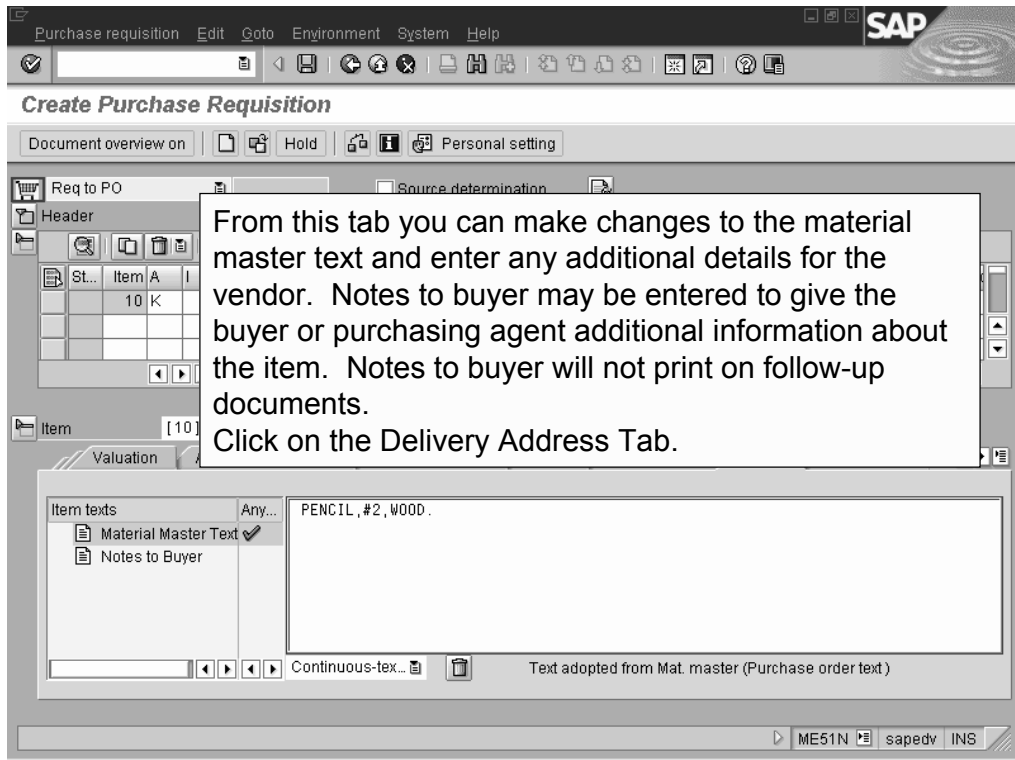
Vendor Material

Assign source of supply

From this tab you can also Assign a Source of Supply or chose your Des. vendor.
Click on the Text Tab.

ME51N sapadv INS

1-18



The screenshot shows the SAP 'Create Purchase Requisition' interface. At the top is a menu bar with 'Purchase requisition', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title is 'Create Purchase Requisition'. Underneath, there are tabs for 'Document overview on', 'Hold', and 'Personal setting'. The 'Document overview on' tab is active, showing a table with columns 'St...', 'Item', and 'A'. The table contains one row with '10' and 'K'. To the right of the table is a 'Source determination' button. Below the table is an 'Item' section with a 'Valuation' button. A text box overlay is positioned over the 'Item' section, containing the following text:

From this tab you can make changes to the material master text and enter any additional details for the vendor. Notes to buyer may be entered to give the buyer or purchasing agent additional information about the item. Notes to buyer will not print on follow-up documents.
Click on the Delivery Address Tab.

Below the text box, there is a section for 'Item texts'. It includes a list of text types: 'Material Master Text' (checked) and 'Notes to Buyer'. To the right of this list is a large text area containing the text 'PENCIL, #2, WOOD.'. Below the text area are buttons for 'Continuous-text...' and 'Text adopted from Mat. master (Purchase order text)'. At the bottom right of the screen, there are status indicators: 'ME51N', 'sapedv', and 'INS'.

1-19

Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO

Header

Source determination

St... Item A I Material

	10	K		10111678
--	----	---	--	----------

Item [10] 10111678, PE

Valuation Account assign

Title Company

Name DFA

DFA Building

Street/House number 1509 West 7th Street RM 600

District PULASKI

Postal code/City 72201 LITTLE ROCK

Reset address

Repeat address on

Address 21953

Customer

ME51N sapadv INS

Type the number in the address field or do a delivery address search. To hold the address for more than one item, click on the Repeat address on button.

Click on the check icon to see if there are any errors.

1-20



Create Purchase Requisition

Document overview on | Hold | Personal setting

Req to PO | Source determination

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. loc.
	10	K		10111678	PENCIL,#2,WOOD	50	EA	D	12/31/2003	OFFICE SU...	Reference Pl...	

Item: [10] 10111678, PENCIL,#2,WOOD

Valuation | Account assignment | Source of supply | Status | Contact person | Texts | Delivery addr...

Title: Company | Address details
Name: DEFA | Reset address
Street/House | Repeat address or
District | 21953
Postal code/ |
No messages issued during check | ME51N | sapadv | INS

Below there is a message saying "No messages issued during check". This means you are ready to save your requisition.

1-21



Purchase requisition Edit Goto Environment System Help

Document overview on Hold Personal setting

Req to PO Source determination

Header

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. loc

Item New item

The Purchase Requisition Number will appear at the bottom of the screen.

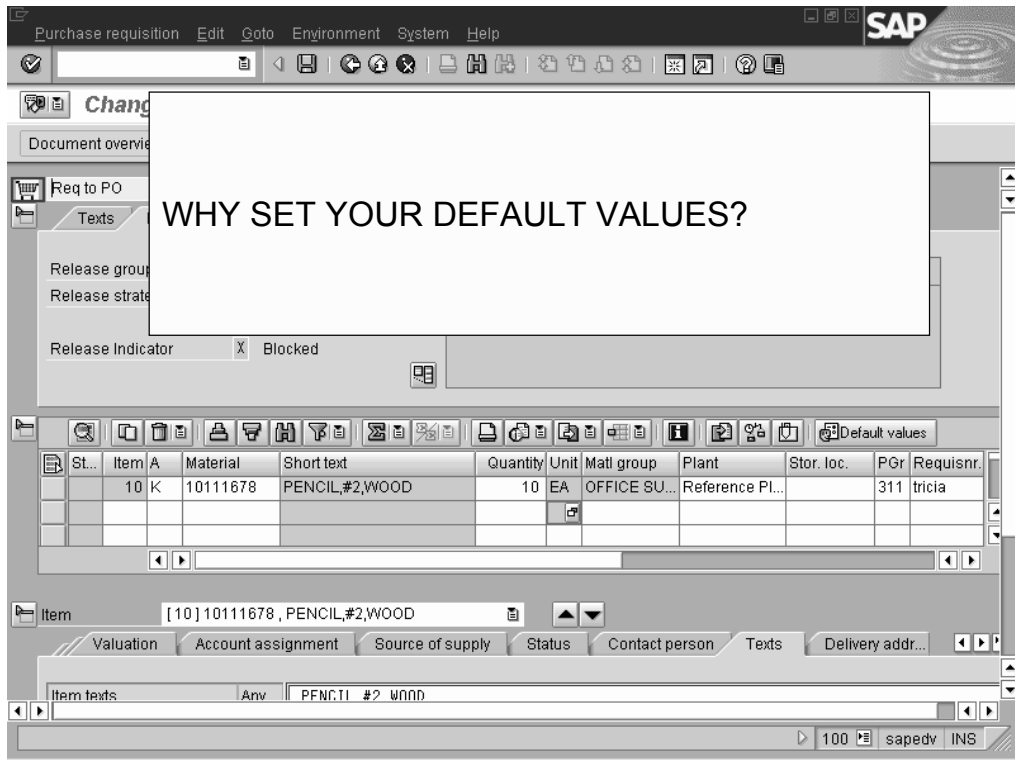
Purchase requisition number 1000160098 created ME51N sapadv INS

1-22



TIME SAVING TIPS

1-23

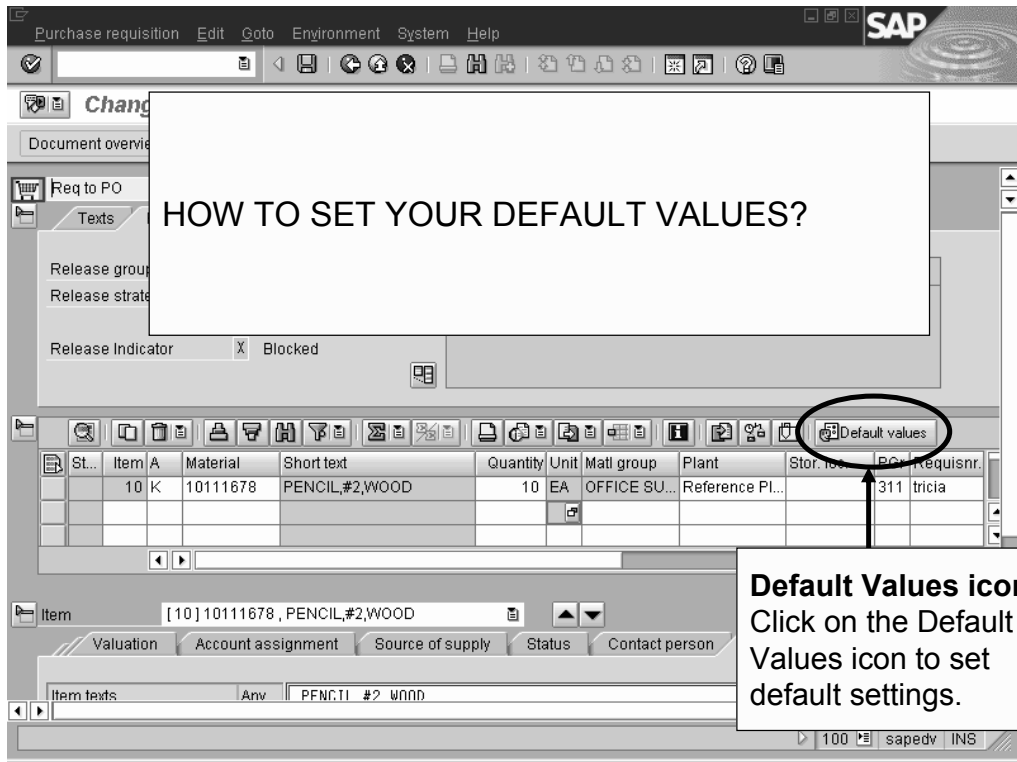


1-24

AASIS Support Center, Patricia Orr
Revised 8-01-04

By setting default values it will save steps in creating the purchase requisition.

Fields that remain constant every time a purchase requisition is created can be set as default values. These values will automatically populate the fields each time a purchase requisition is created.



1-25

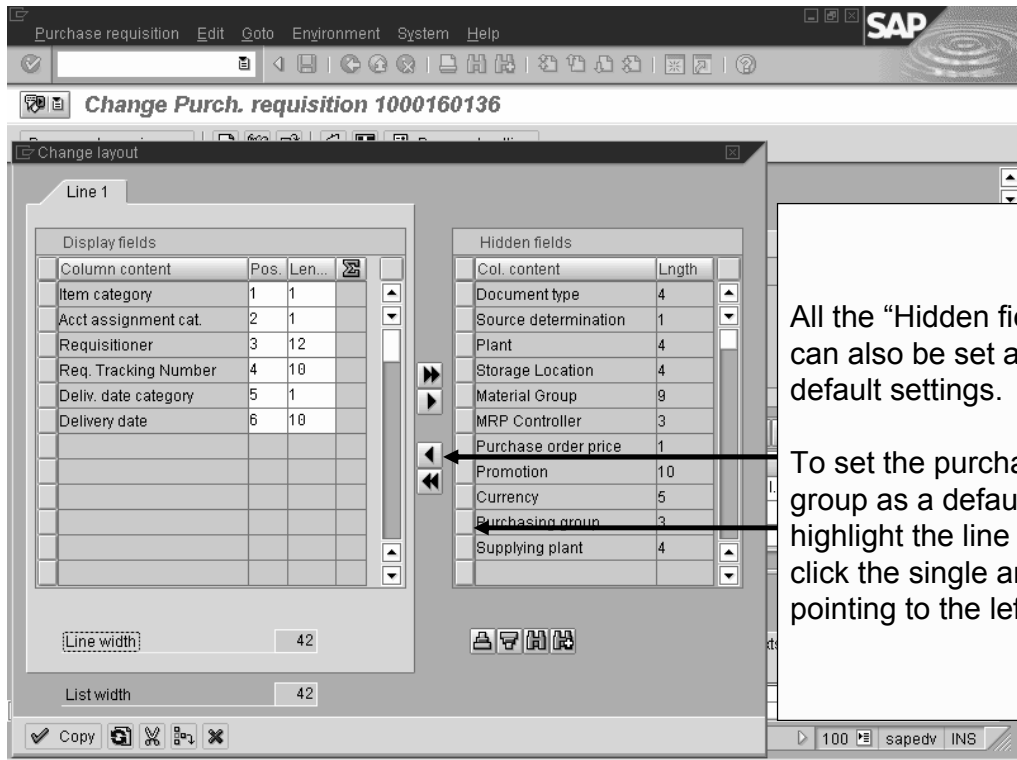


The screenshot shows the SAP 'Change Purch. requisition 1000160136' window. The 'Item Default Values' dialog box is open, displaying fields for 'Item category' (Standard), 'Acct. assig. cat.' (10111678), 'Delivery date', 'Requisitioner', and 'Tracking Number'. There are also checkboxes for 'Always propose' for each of these fields. A 'More fields ...' button is visible at the bottom of the dialog box. An arrow points from the text box below to this button. The background window shows a table with columns: Plant, Stor. loc., PGr, and Requisitioner. The table contains one row with values: 10, EA, OFFICE SU..., Reference Pl..., 311, and tricia. The status bar at the bottom shows '100', 'sapedv', and 'INS'.

From this screen you can set the acct. assig. cat., delivery date, requisitioner, and tracking number.

Click on the More Fields button to select more default settings.

1-26



Change Purch. requisition 1000160136

Change layout

Line 1

Column content	Pos.	Len...
Item category	1	1
Acct assignment cat.	2	1
Requisitioner	3	12
Req. Tracking Number	4	10
Deliv. date category	5	1
Delivery date	6	10

Line width: 42

List width: 42

Col. content	Length
Document type	4
Source determination	1
Plant	4
Storage Location	4
Material Group	9
MRP Controller	3
Purchase order price	1
Promotion	10
Currency	5
Purchasing group	3
Supplying plant	4

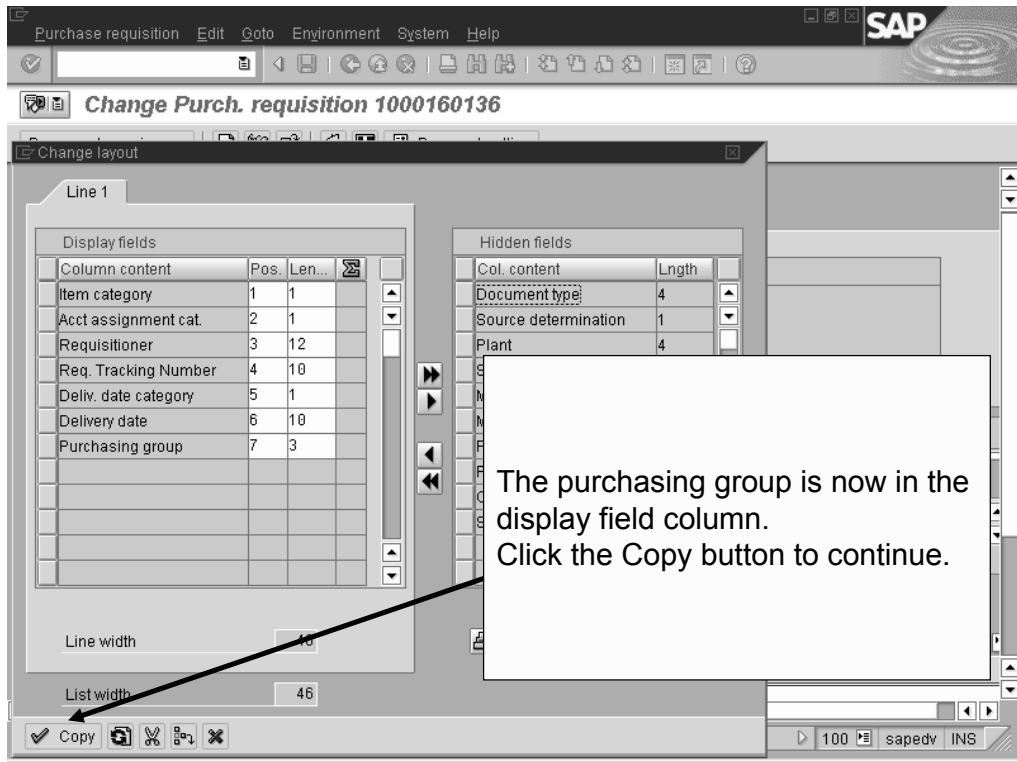
Copy

100 sapadv INS

All the "Hidden fields" can also be set as default settings.

To set the purchasing group as a default, highlight the line and click the single arrow pointing to the left.

1-27



Change Purch. requisition 1000160136

Change layout

Line 1

Column content	Pos.	Len...
Item category	1	1
Acct assignment cat.	2	1
Requisitioner	3	12
Req. Tracking Number	4	10
Deliv. date category	5	1
Delivery date	6	10
Purchasing group	7	3

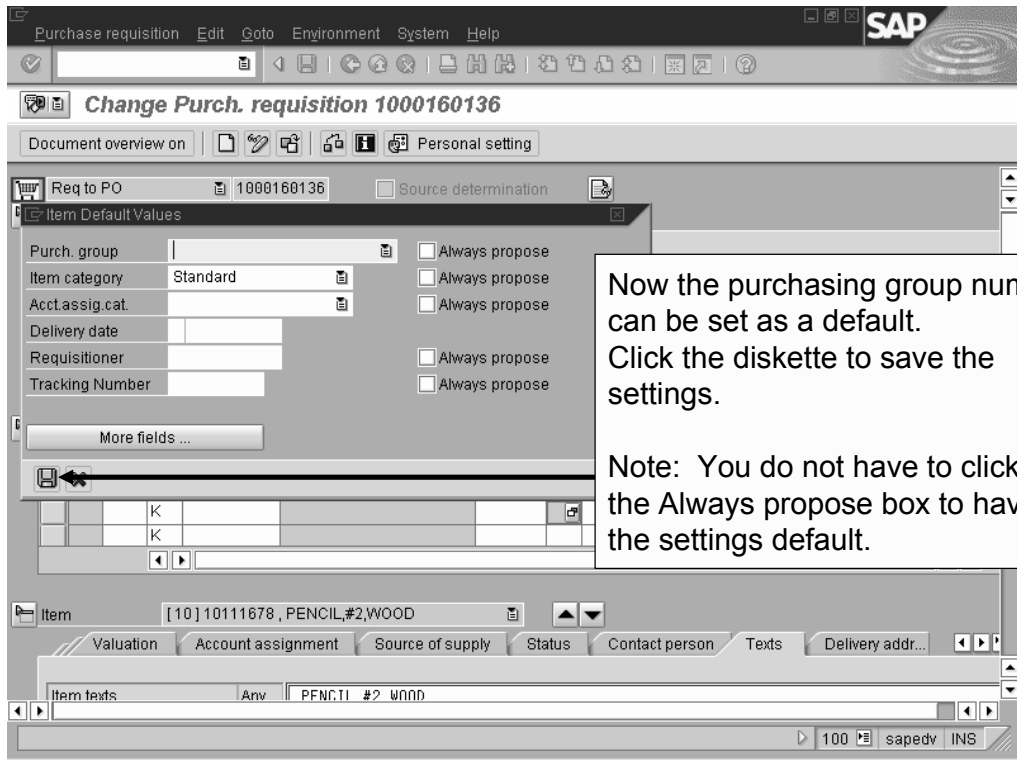
Line width: 48

List width: 46

☒ Copy

The purchasing group is now in the display field column.
Click the Copy button to continue.

1-28



The screenshot shows the SAP 'Change Purch. requisition 1000160136' window. The 'Item Default Values' tab is active, displaying fields for 'Purch. group', 'Item category', 'Acct.assig.cat.', 'Delivery date', 'Requisitioner', and 'Tracking Number'. To the right of these fields are four 'Always propose' checkboxes. A callout box points to the 'Purch. group' field, stating: 'Now the purchasing group number can be set as a default. Click the diskette to save the settings.' Another callout box points to the 'Always propose' checkboxes, stating: 'Note: You do not have to click the Always propose box to have the settings default.' The 'Item' field at the bottom shows '[10]10111678, PENCIL,#2,WOOD'. The 'Item texts' field shows 'Anv PFNCTI #2 WOOD'. The status bar at the bottom indicates '100 sapedv INS'.

1-29



The screenshot shows the SAP 'Change Purch. requisition 1000160136' interface. A large white text box is overlaid on the screen with the text 'WHY USE THE COPY ITEM FEATURE?'. Below the text box is a table with the following data:

St...	Item A	Material	Short text	Quantity	Unit	Matl group	Plant	Stor. loc.	PGr	Requisnr.
	10	K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311 tricia
		K								
		K								

Below the table, the 'Item' field is set to '[10] 10111678, PENCIL,#2,WOOD'. The 'Valuation' tab is selected, showing a valuation price of 2.00 USD for 1 EA, with a total value of 20.00 USD. The 'Goods receipt' checkbox is checked. The bottom status bar shows '100 sapedv INS'.

1-30

AASIS Support Center, Patricia Orr
Revised 8-01-04

The copy item feature allows the requisitioner to copy one line item (item 10) to the next line item (item 20).

For example, your agency is purchasing 12 computers. They are identical except each computer has a unique asset number that will need to be entered. Instead of entering all the same information 12 times on the PR, you can use the copy feature to save time.



Change Purch. requisition 1000160136

Document overview on | Personal setting

Texts | Release strategy

Release group: RQ Requisition
Release strategy: 01 Under \$1,000
Release Indicator: X Blocked

Code	Description	Stat...
01	Under \$1,000	⚠

St... Item A Material Short text Quantity Unit Matl group Plant Stor. loc. PGr Requisnr.

	0 K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311	tricia
	K									
	K									

To copy a line item, highlight the line and click on the copy item icon.

1-31

Purchase requisition Edit Goto Environment System Help

Change Purch. requisition 1000160136

Document overview on [Icons] Personal setting

Texts Release strategy

Release group
Release strategy
Release Indicator

[Icons] Default values

St...	Item	A	Material	Short text	Quantity	Unit	Matl group	Plant	Stor. loc.	PGr	Requisnr.
	10	K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311	tricia
	20	K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311	tricia
		K									

Item [20] 10111678 , PENCIL,#2,WOOD

Valuation Account assignment Source of supply Status Contact person Texts Delivery addr...

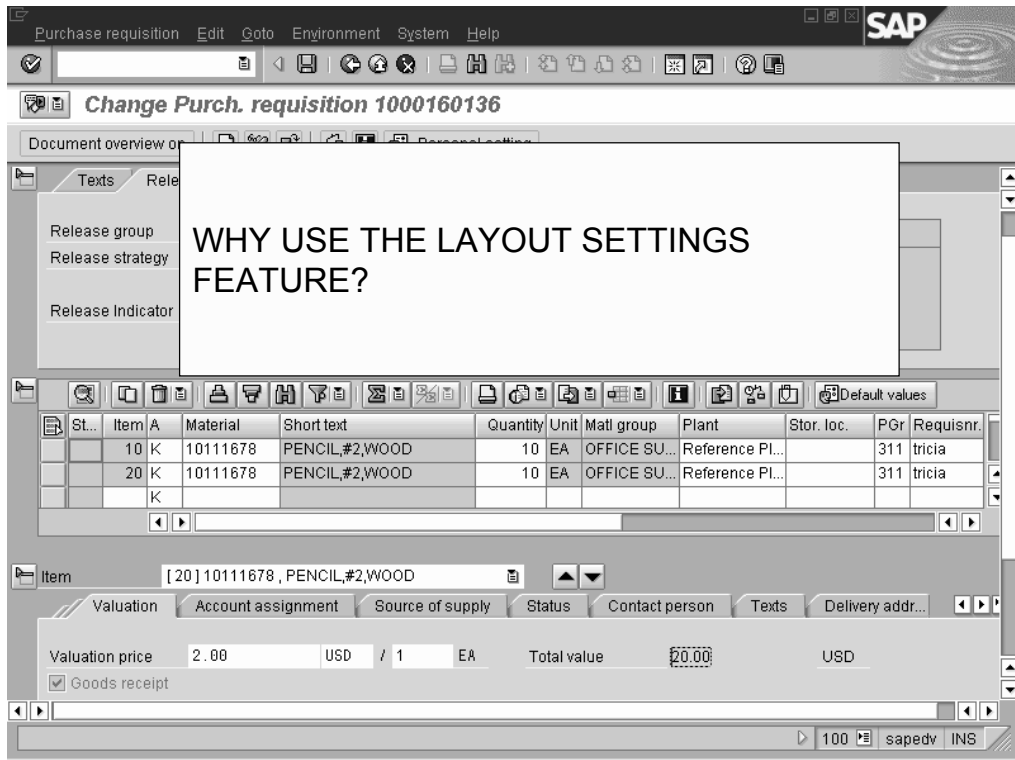
Valuation price 2.00 USD / 1 EA Total value 0.00 USD

☒ Goods receipt

Enter Valuation price 100 sapedv INS

Item 10 was copied to item 20. The system will require you to enter a valuation price.
To continue the process, just continue to highlight the item and click on the copy item icon.
Make any required changes to new lines.

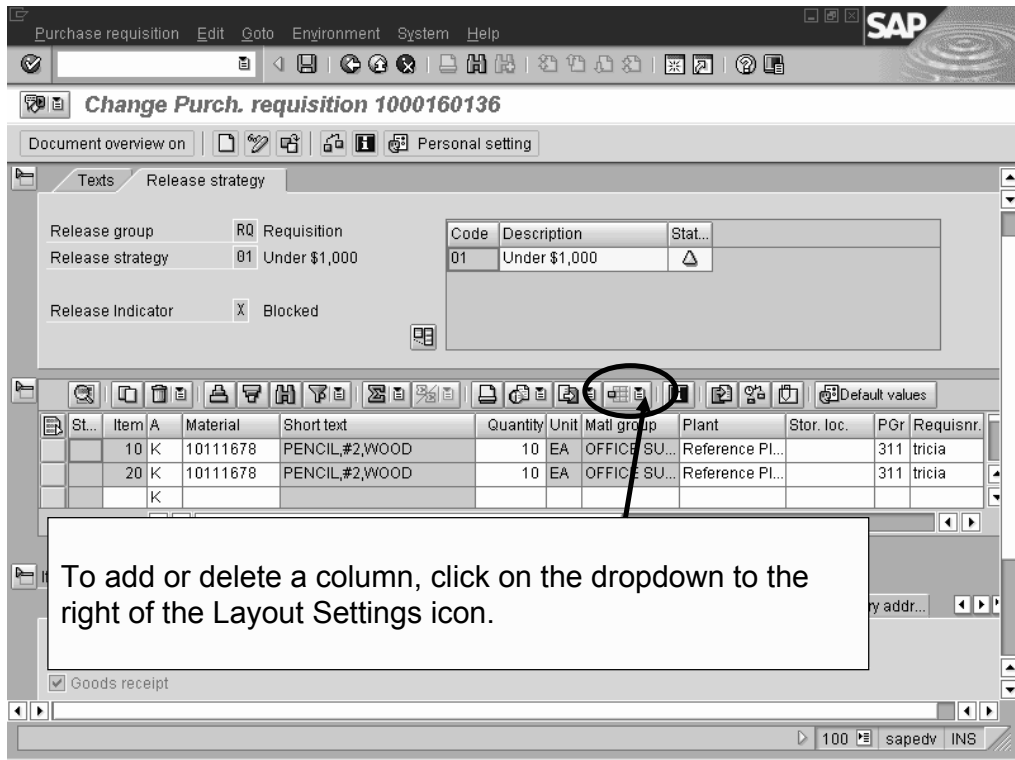
1-32



1-33

AASIS Support Center, Patricia Orr
Revised 8-01-04

You can add or delete a column on the purchase requisition. For example, the requisitioner might want to add a total value column to the PR. By using the Layout Setting feature each time a PR is created, the requisitioner will see the added column.



Change Purch. requisition 1000160136

Document overview on | Personal setting

Texts | Release strategy

Release group: RQ Requisition
Release strategy: 01 Under \$1,000
Release Indicator: X Blocked

Code	Description	Stat...
01	Under \$1,000	⚠

Layout Settings icon dropdown arrow circled

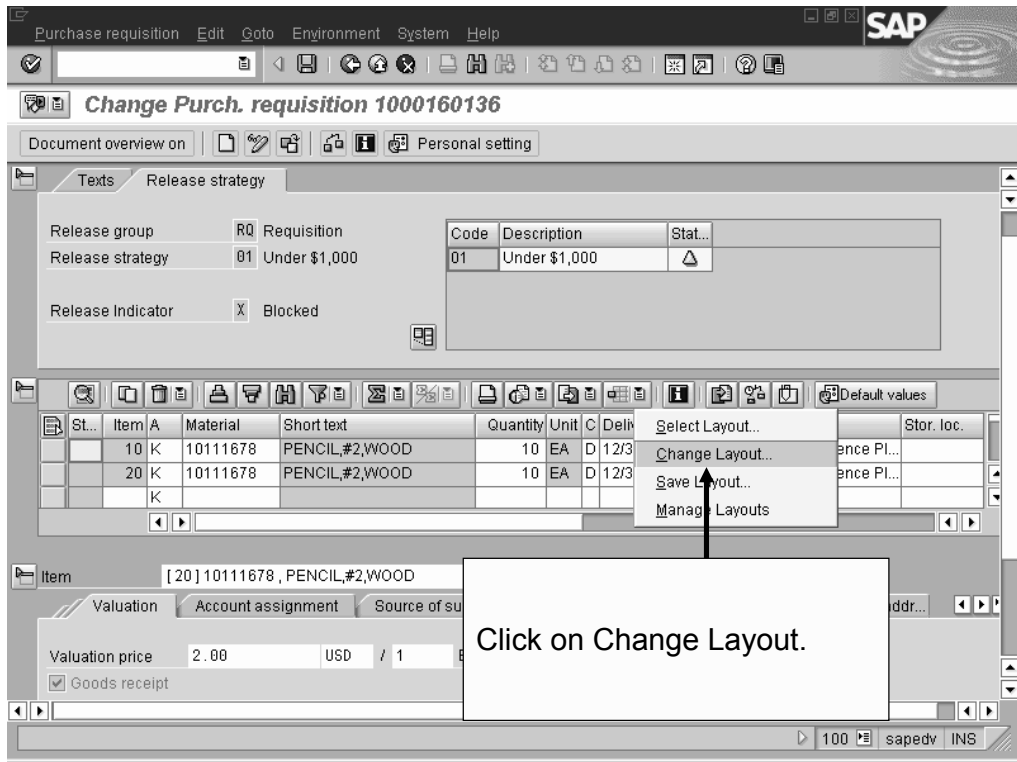
St...	Item A	Material	Short text	Quantity	Unit	Matl group	Plant	Stor. loc.	PGr	Requisnr.
	10 K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311	tricia
	20 K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311	tricia

Goods receipt checkbox checked

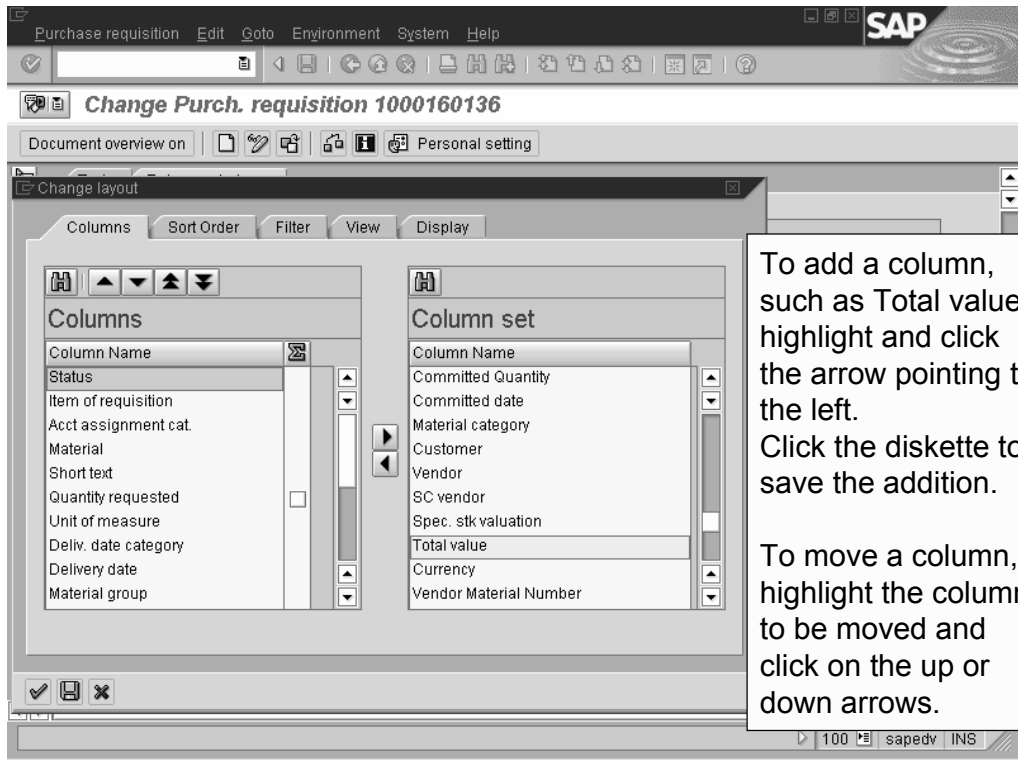
Status bar: 100 sapadv INS

To add or delete a column, click on the dropdown to the right of the Layout Settings icon.

1-34



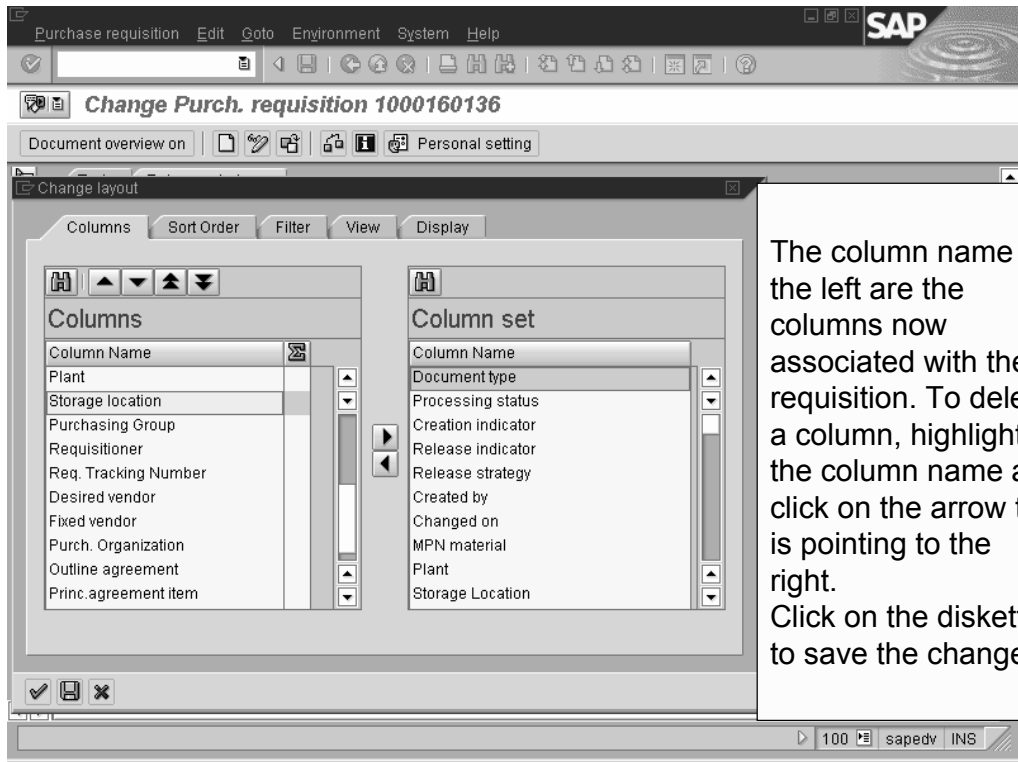
1-35



To add a column, such as Total value, highlight and click the arrow pointing to the left. Click the diskette to save the addition.

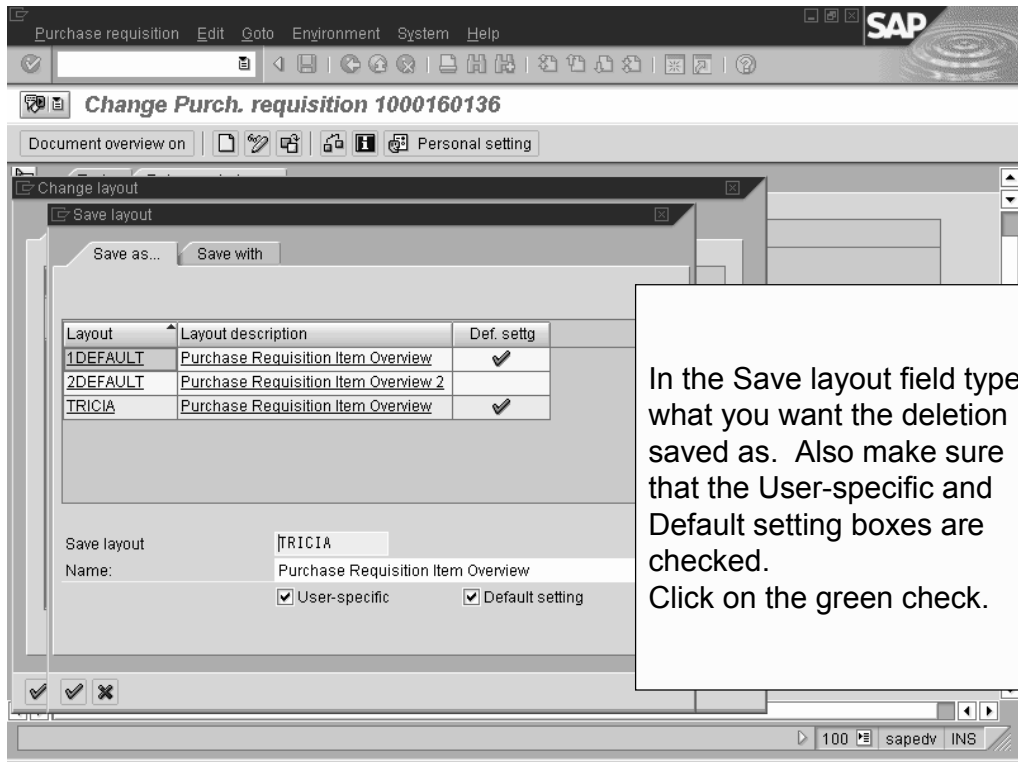
To move a column, highlight the column to be moved and click on the up or down arrows.

1-36

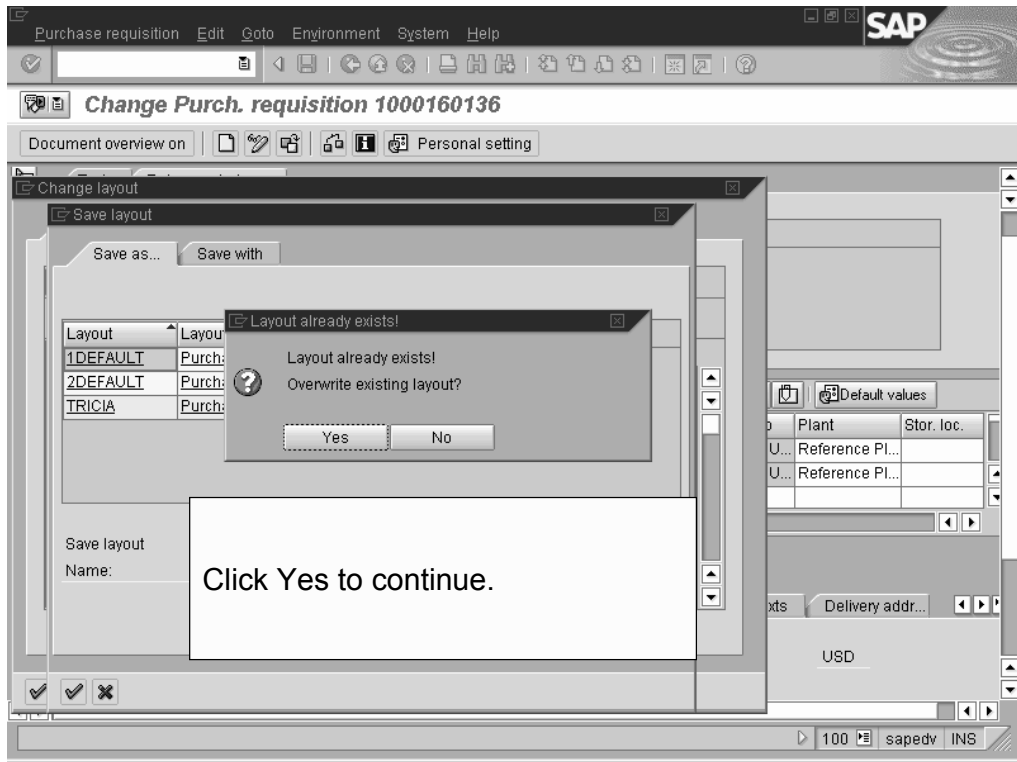


The column name to the left are the columns now associated with the requisition. To delete a column, highlight the column name and click on the arrow that is pointing to the right. Click on the diskette to save the change.

1-37



1-38



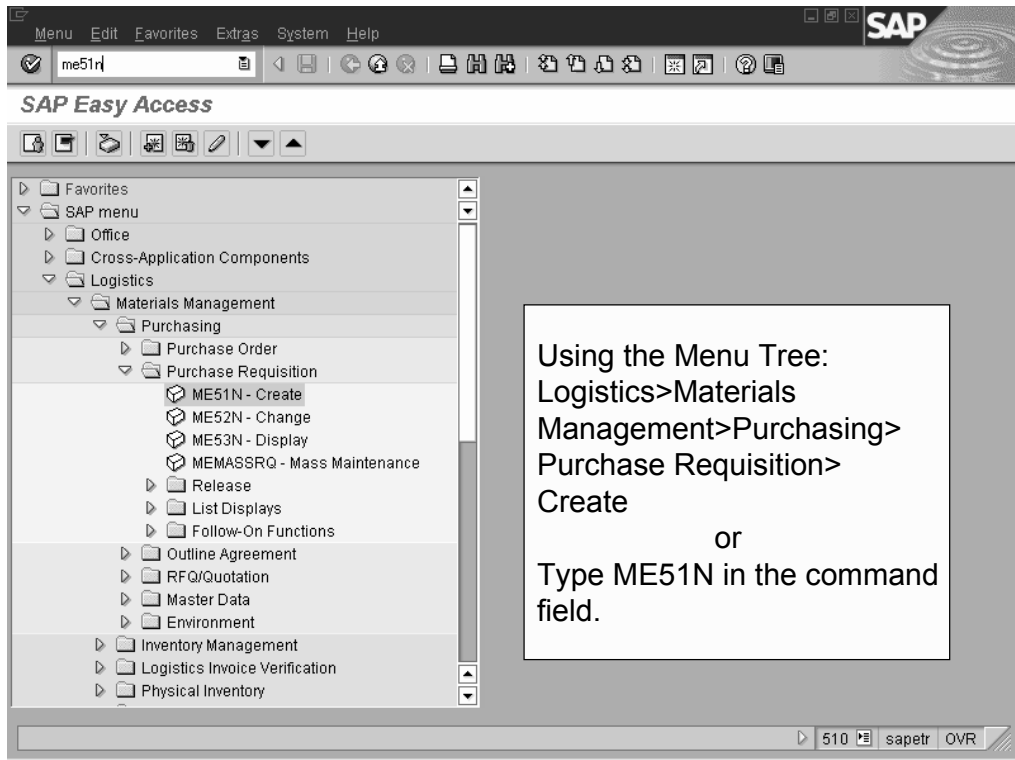
1-39



Create a Purchase Requisition with Reference to a Requisition ME51N

USING THE MENU TREE GO TO
LOGISTICS>MATERIALS
MANAGEMENT>PURCHASING>
PURCHASE REQUISITION>CREATE

1-40



1-41



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on | Hold | Personal setting

Req to PO ☐ Source determination

Texts

Header note Any... Continuous-text...

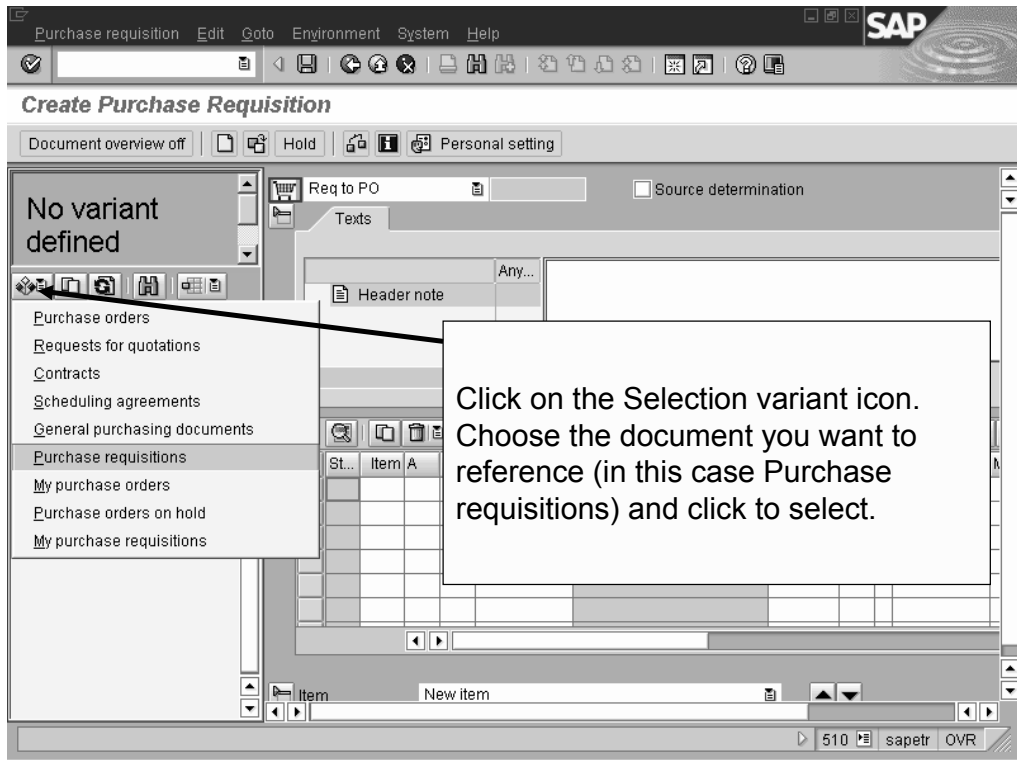
Click Document overview on.

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. loc
												Reference PI...
												Reference PI...
												Reference PI...
												Reference PI...
												Reference PI...
												Reference PI...

Item New item

510 sapetr OVR

1-42



1-43



The screenshot displays the SAP 'Purchase requisitions' search screen. The 'General selections' section includes a 'Max. no. of hits' field set to 5000 and three checkboxes: 'Open only', 'Released only', and 'Assigned, open, and released'. The 'Program selections' section lists various search criteria with input fields and 'to' indicators. The 'Purchase requisition number' field contains the value '1000000263'. The bottom status bar shows '510 sapetr OVR'.

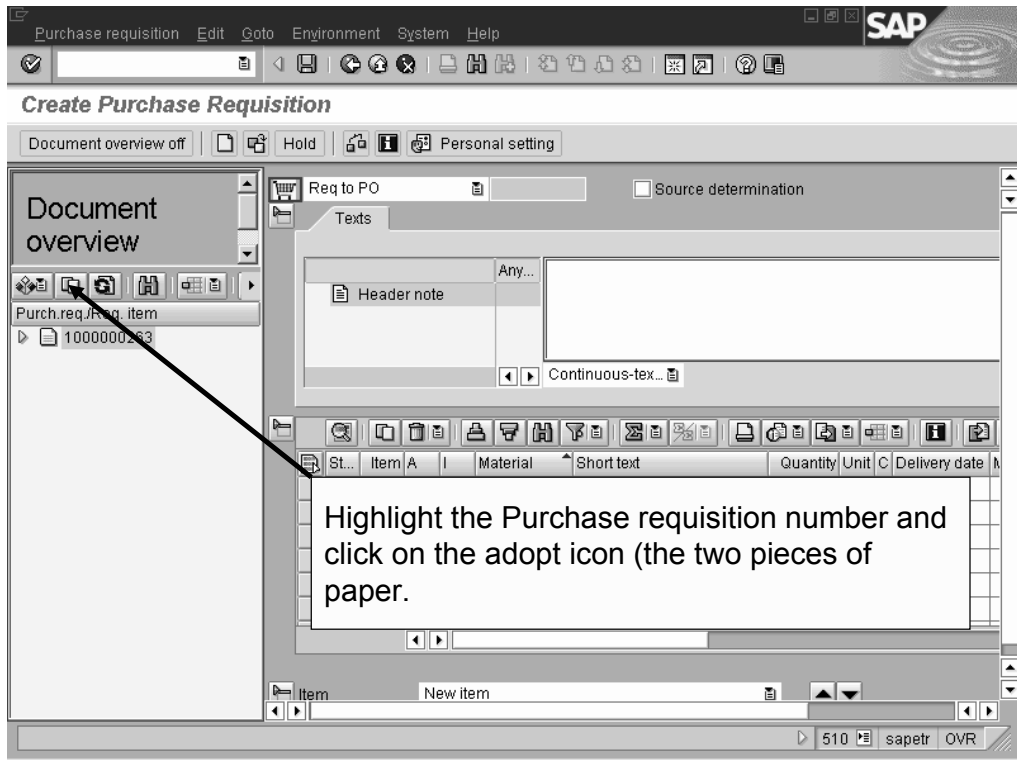
Field	Value	Operator
Name of requisitioner/reques		to
Requisition (request) date		to
Purchase requisition number	1000000263	to
Requirement Tracking Number		to
Item number		to
Document type		to
Purchasing group		to
Purchasing organization		to
MPN material		to
Name of processor		to
Fixed vendor		to
Account assignment category		to
Outline agreement number		to

Type in the PR number that you want to reference.

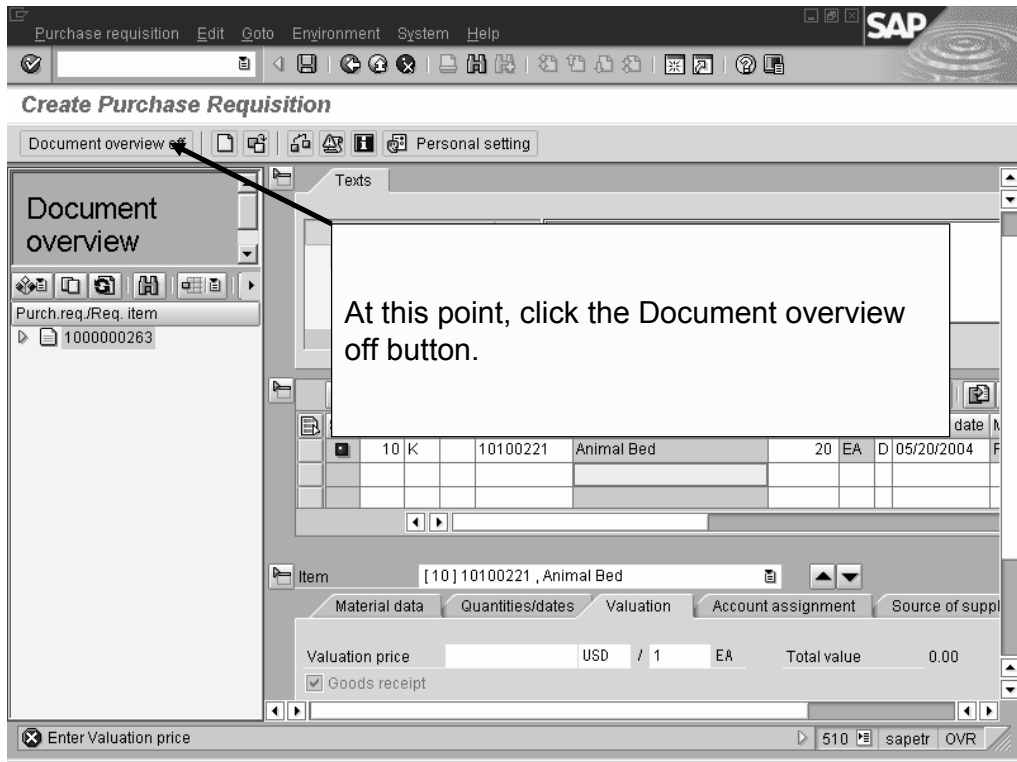
If you do not know the number you can do a search. Narrow the search by using fields under Program selection. You can also search by using the matchcode search button to the right of the Purchase requisition number field.

Once you have typed or chosen the PR number in the Purchase requisition field execute to continue.

1-44



1-45



1-46



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on [Icons] Personal setting

Continuous-text...

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. loc
	10	K		10100221	Animal Bed	20	EA	D	05/20/2004	FURNITUR...		
											Reference PI...	
											Reference PI...	

Item [10] 10100221 , Animal Bed

Material data Quantities/dates Valuation Account assignment Source of supply Status Conta...

Valuation price 5.00 USD / 1

☒ Goods receipt
☒ Invoice receipt
☐ GR non-valuated

A valuation price must be entered.
Hit enter.

510 sapetr OVR

1-47

Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on Hold Personal setting

Req to PO ☐ Source determination

Texts Release strategy

Release group RQ Re
Release strategy 01 Ur
Release Indicator X Bl

You can make changes to all fields that are not grayed out.
Click the check icon to check your requisition.

St... Item A I Material Short text Quantity Unit C Delivery date Matl group Plant Stor. Id

	10	K		10100221	Animal Bed	20	EA	D	05/20/2004	FURNITUR...	Reference PI...
											Reference PI...
											Reference PI...

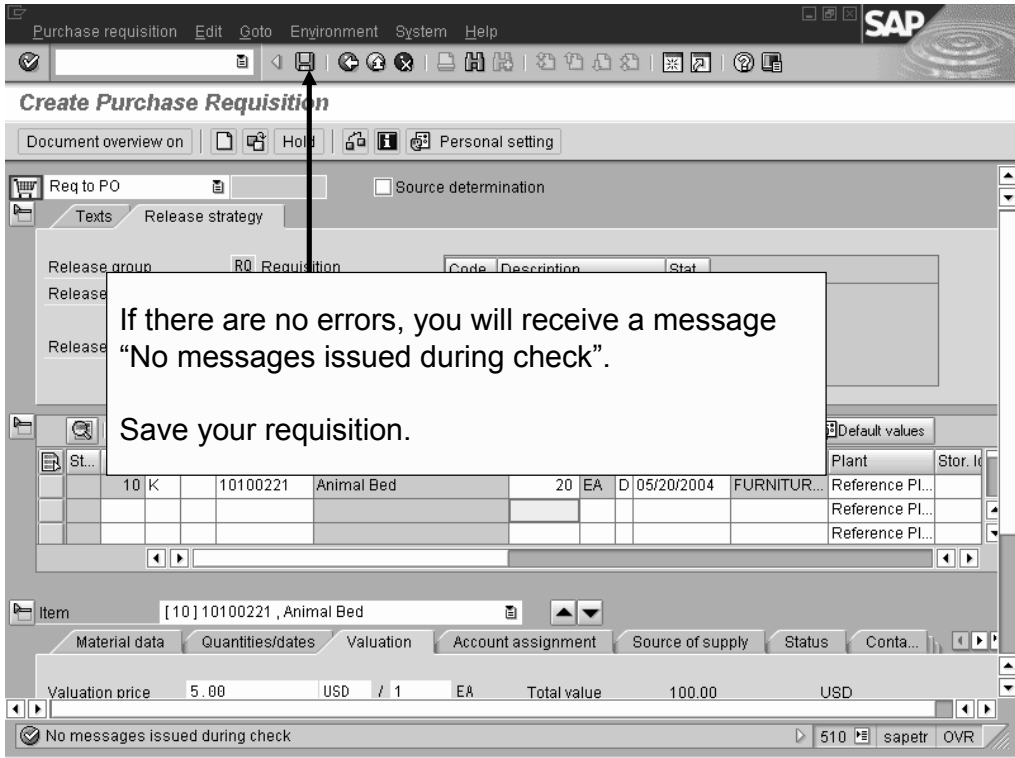
Item [10] 10100221 , Animal Bed

Material data Quantities/dates Valuation Account assignment Source of supply Status Conta...




Valuation price 5.00 USD / 1 EA Total value 100.00 USD


510 sapetr OVR

1-48



Create Purchase Requisition

Document overview on |  |  |  | Personal setting

Req to PO  ☐ Source determination

Texts Release strategy

Release group RQ Requisition Code Description Stat

Release

Release

St...

Release group	Code	Description	Stat
10 K	10100221	Animal Bed	20 EA

Item [10] 10100221 , Animal Bed

Material data Quantities/dates Valuation Account assignment Source of supply Status Conta...

Valuation price 5.00 USD / 1 EA Total value 100.00 USD

☒ No messages issued during check 510 sapetr OVR

1-49



Purchase requisition Edit Goto Environment System Help

Create Purchase Requisition

Document overview on | Hold | Personal setting

Req to PO ☐ Source determination

Texts

Header note Any... Continuous-text...

St... Item A I Material Short text Quantity Unit C Delivery date Matl group Plant Stor. Id

Reference PI...
Reference PI...
ence PI...
ence PI...
ence PI...
ence PI...

You will receive the message "Purchase requisition number _____ created."

Item New item

Purchase requisition number 1000000314 created 510 sapetr OVR

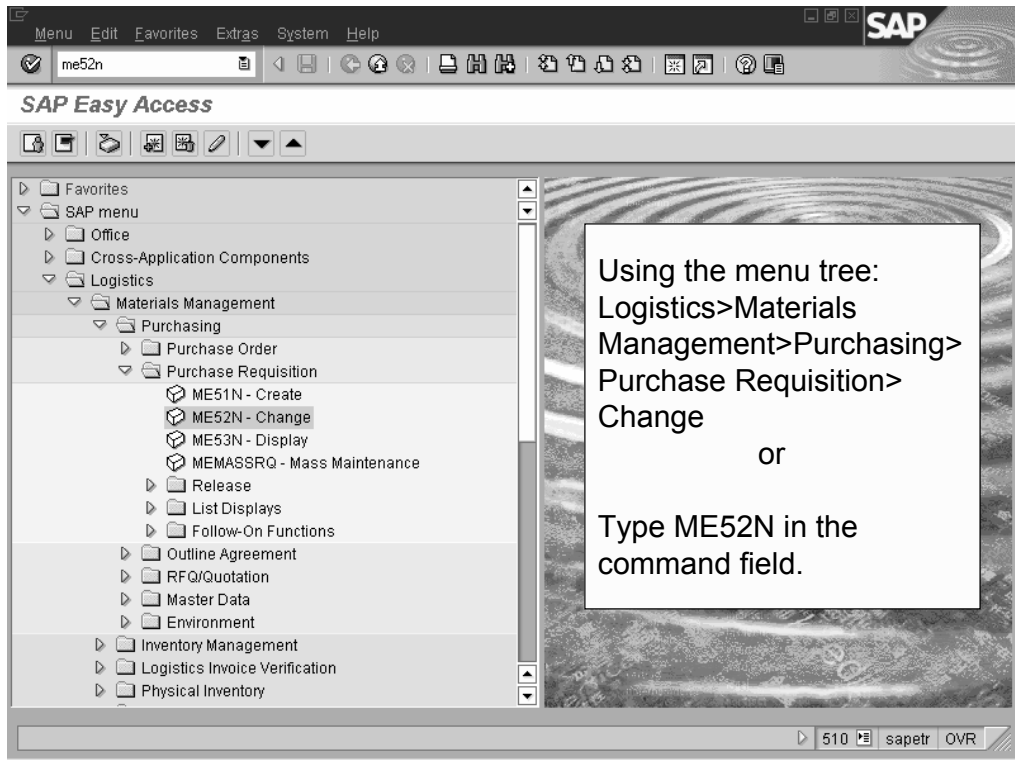
1-50



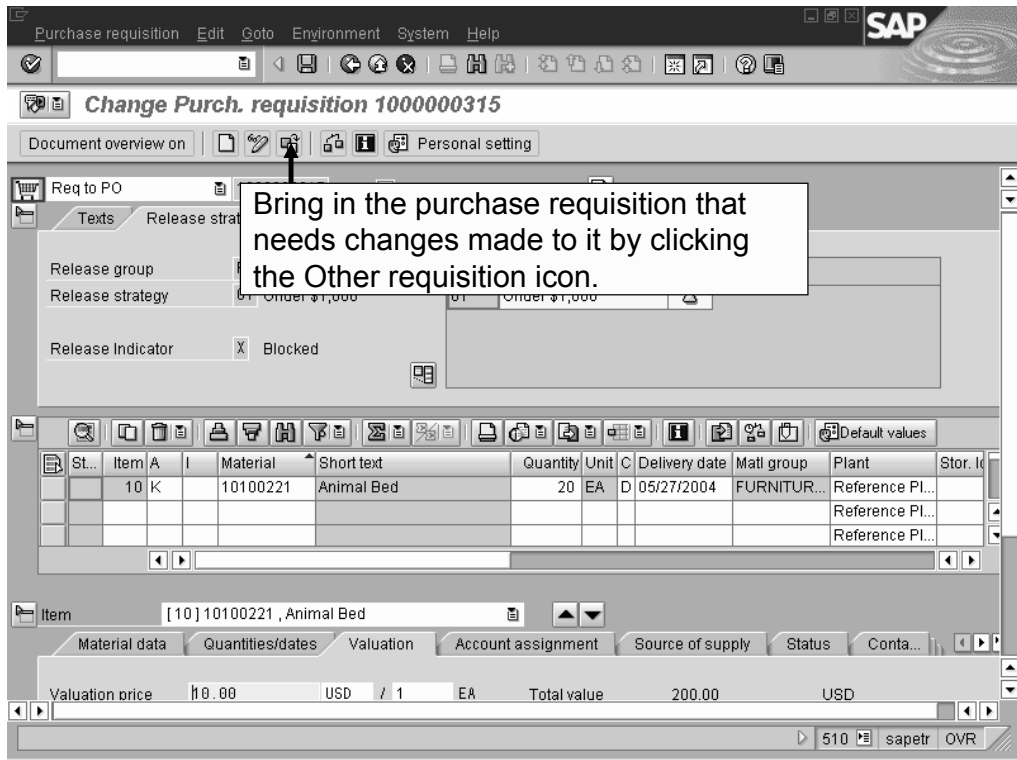
Change a Purchase Requisition ME52N

USING THE MENU TREE GO TO
LOGISTICS>MATERIALS
MANAGEMENT>PURCHASING>
PURCHASE REQUISITION>CHANGE

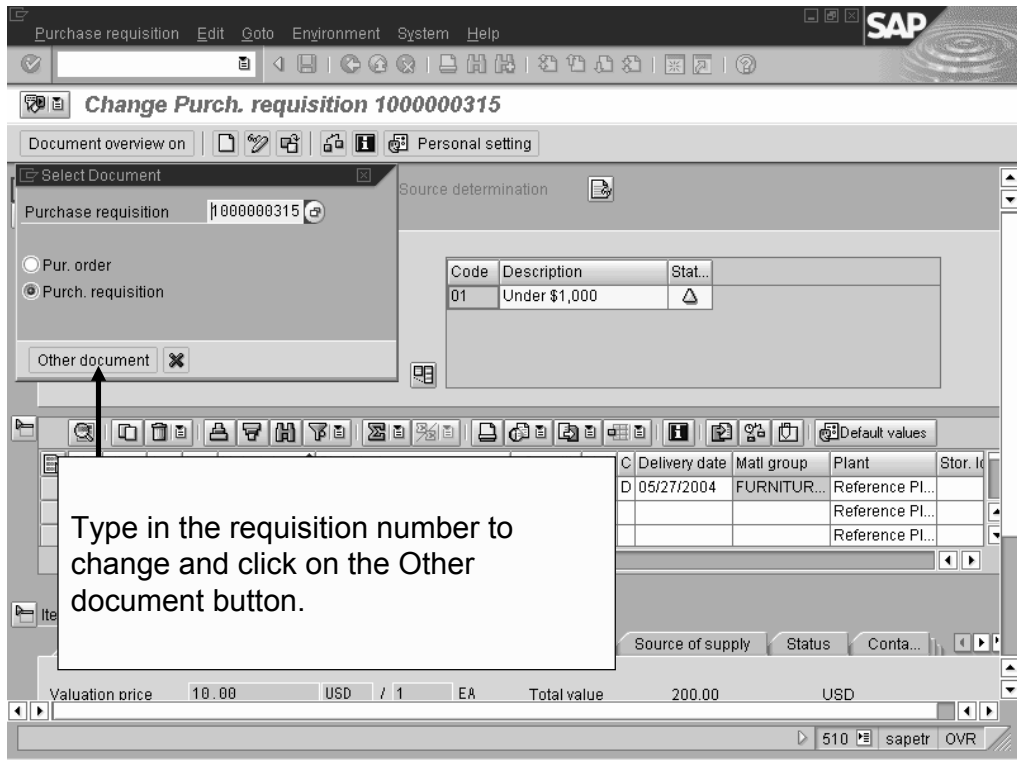
1-51



1-52



1-53



Change Purch. requisition 1000000315

Document overview on | Personal setting

Select Document

Purchase requisition 1000000315

☐ Pur. order
☒ Purch. requisition

Other document

Source determination

Code	Description	Stat...
01	Under \$1,000	

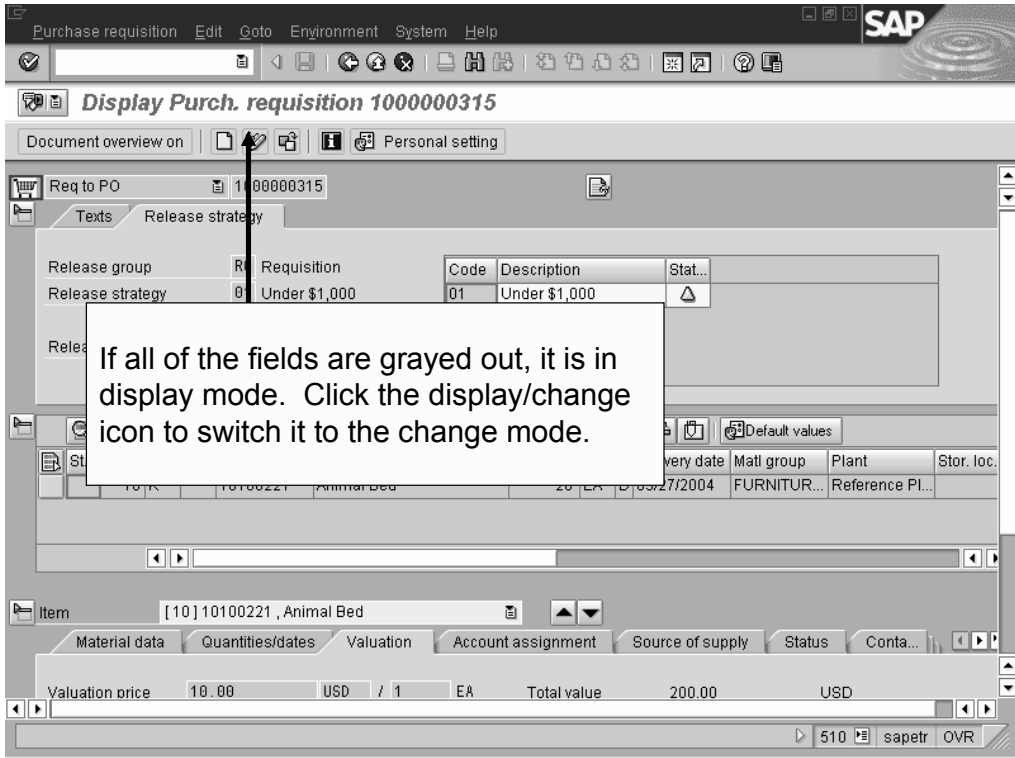
Delivery date: 05/27/2004
 Matl group: FURNITUR...
 Plant: Reference Pl...
 Stor. loc: Reference Pl...

Source of supply: 510
 Status: sapetr
 Conta...: OVR

Valuation price: 10.00 USD / 1 EA Total value: 200.00 USD

Type in the requisition number to change and click on the Other document button.

1-54



The screenshot shows the SAP interface for displaying a purchase requisition. The title bar reads "Display Purch. requisition 1000000315". The main area is divided into several sections:

- Document overview on:** Includes icons for document overview, display, change, and personal settings.
- Req to PO:** Shows the requisition number 1000000315.
- Release strategy:** A table with columns: Release group, Release strategy, Code, Description, and Status. The data row shows: Release group R, Release strategy 01, Code 01, Description Under \$1,000, and Status (triangle icon).
- Item:** Shows the item number [10]10100221, Animal Bed.
- Valuation:** Shows the valuation price 10.00 USD, unit 1, EA, and total value 200.00 USD.

A callout box points to the display/change icon in the document overview section, stating: "If all of the fields are grayed out, it is in display mode. Click the display/change icon to switch it to the change mode."

1-55



The screenshot shows the SAP 'Change Purch. requisition 1000000315' interface. The top menu bar includes 'Purchase requisition', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main window has a title bar 'Change Purch. requisition 1000000315' and a 'Document overview on' section with icons for 'Personal setting'. The 'Texts' tab is active, showing a 'Header note' section with a 'Text can be typed here' area. A text overlay box in the center of the screen contains the text: 'You can change any of the fields that are not grayed out. On the header tabs, you can change the text.' Below the overlay, the 'Item' section is visible, showing '[10]10100221, Animal Bed'. The 'Valuation' tab is selected, displaying 'Valuation price 10.00 USD / 1 EA' and 'Total value 200.00 USD'. The bottom status bar shows '510 sapetr OVR'.

1-56



The screenshot shows the SAP 'Change Purch. requisition 1000000315' interface. The top menu bar includes 'Purchase requisition', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main window is titled 'Change Purch. requisition 1000000315' and has a 'Document overview on' button. The 'Header' section shows 'Req to PO' as '1000000315' and a 'Source determination' checkbox. Below the header is a table with columns: 'St...', 'Item', 'A', 'I', 'Material', 'Short text', 'Quantity', 'Unit', 'C', 'Delivery date', 'Matl group', 'Plant', and 'Stor. l...'. The table contains one row with the following data: '10', 'K', '10100221', 'Animal Bed', '20', 'EA', 'D', '05/27/2004', 'FURNITUR...', 'Reference Pl...', and 'Reference Pl...'. Below the table is a section for 'Item' with a dropdown menu showing '[10] 10100221, Animal Bed'. A large text box is overlaid on the bottom half of the screen, containing the text: 'In the line item section you can change and account assignment, material, quantity and delivery date. Scroll over.'

St...	Item	A	I	Material	Short text	Quantity	Unit	C	Delivery date	Matl group	Plant	Stor. l...
	10	K		10100221	Animal Bed	20	EA	D	05/27/2004	FURNITUR...	Reference Pl...	Reference Pl...

1-57



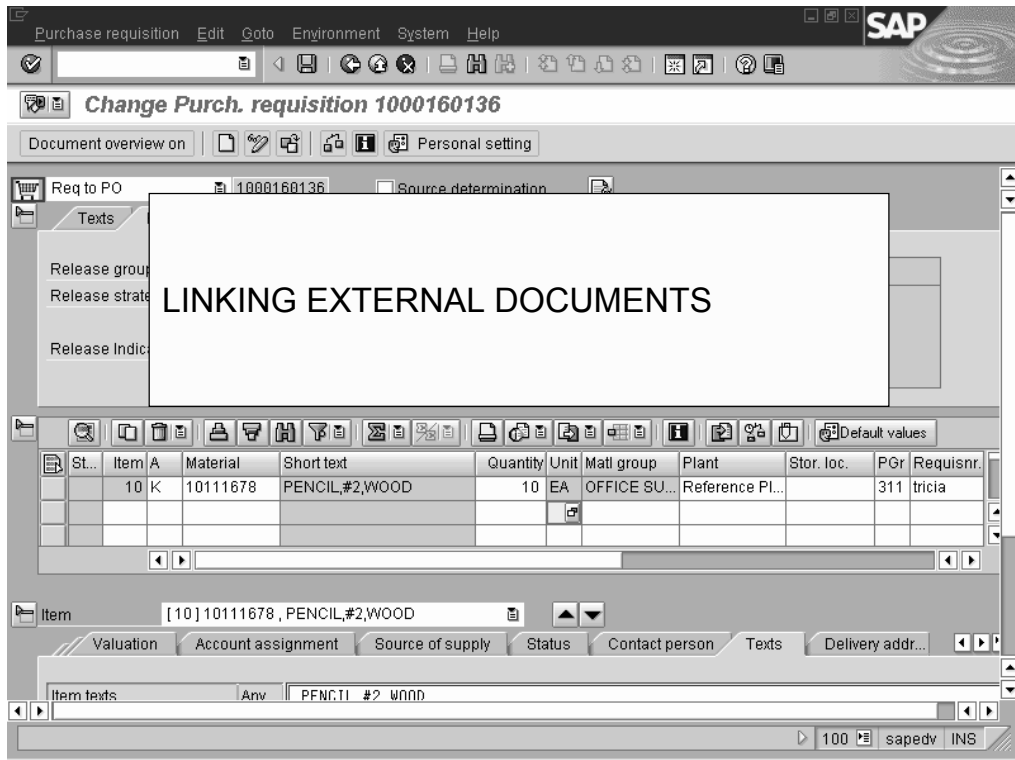
The screenshot shows the SAP 'Change Purch. requisition 1000000315' interface. The top menu bar includes 'Purchase requisition', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main window is titled 'Change Purch. requisition 1000000315' and has a 'Document overview on' button. The 'Header' section shows 'Req to PO' as '1000000315' and 'Source determination' as 'Source determination'. Below the header is a table with columns: 'St...', 'Item', 'Plant', 'Stor. loc.', 'PGr', 'Requisnr.', 'Tracking...', 'Des.vendor', 'Fixed vendor', 'POrg', 'Agreement', 'Item', and 'Info rec'. The table contains three rows of data. Below the table is a search bar with the text '[10] 10100221, Animal Bed'. To the left of the search bar is a 'Valuation' section with checkboxes for 'Good', 'Invoic', and 'GR n'. A text box is overlaid on the screenshot, containing the text: 'Changes can be made to the purchasing group, requisitioner, tracking number and the purchasing organization.'

St...	Item	Plant	Stor. loc.	PGr	Requisnr.	Tracking...	Des.vendor	Fixed vendor	POrg	Agreement	Item	Info rec
	10	Reference Pl...		C00	trisha	PNORR			0610			
		Reference Pl...		C00	trisha	PNORR						
		Reference Pl...		C00	trisha	PNORR						

1-58



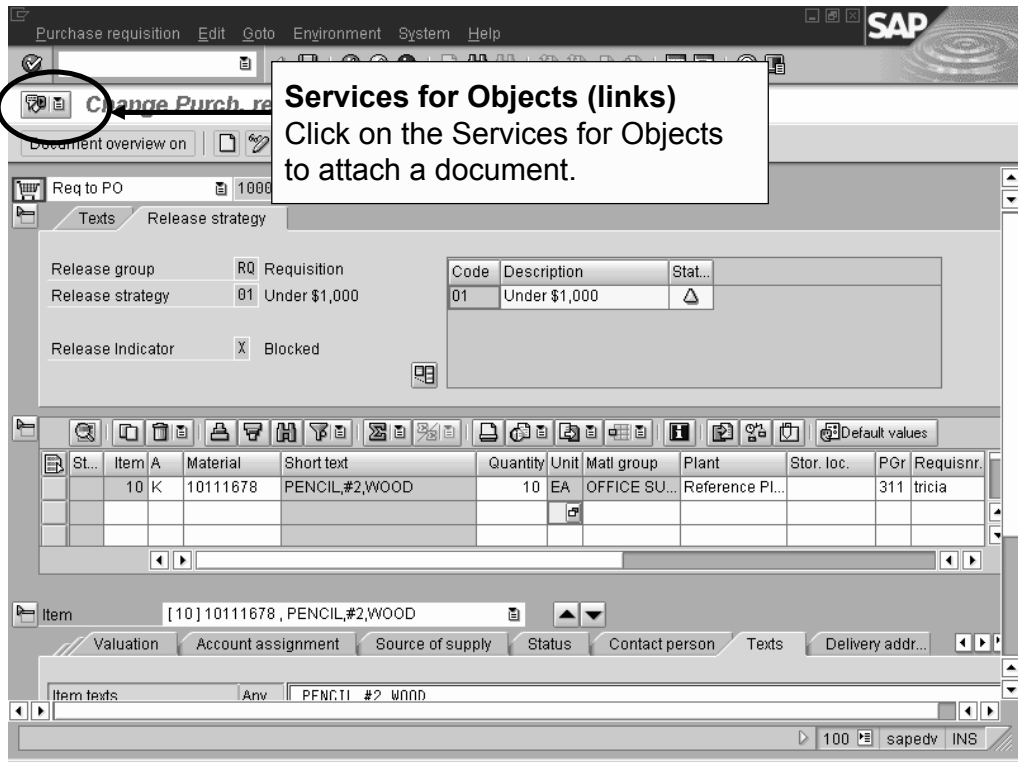
1-59



1-60

AASIS Support Center, Patricia Orr
Revised 8-01-04

Linking external documents allows the requisitioner to attach documents (such as word documents) to the purchase requisition.



Services for Objects (links)
Click on the Services for Objects to attach a document.

Purchase requisition Edit Goto Environment System Help

Change Purch. re...

Document overview on

Req to PO 1000

Texts Release strategy

Release group RQ Requisition
Release strategy 01 Under \$1,000
Release Indicator X Blocked

Code	Description	Stat...
01	Under \$1,000	⚠

St...	Item A	Material	Short text	Quantity	Unit	Matl group	Plant	Stor. loc.	PGr	Requisnr.
	10 K	10111678	PENCIL,#2,WOOD	10	EA	OFFICE SU...	Reference Pl...		311	tricia

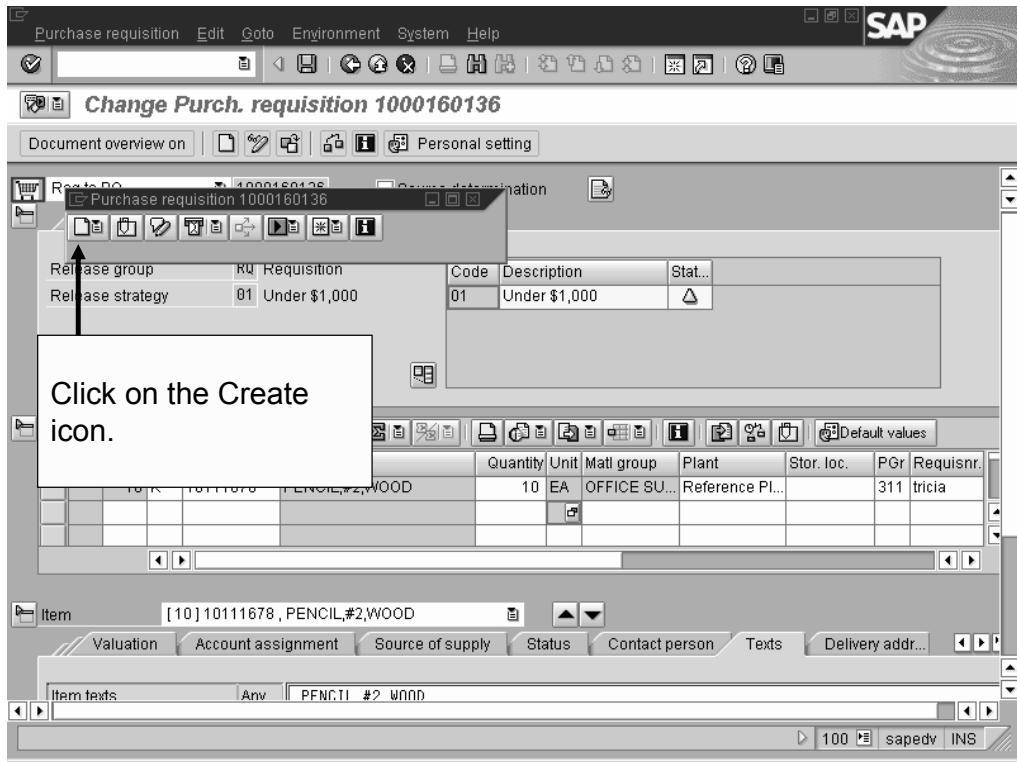
Item [10]10111678, PENCIL,#2,WOOD

Valuation Account assignment Source of supply Status Contact person Texts Delivery addr...

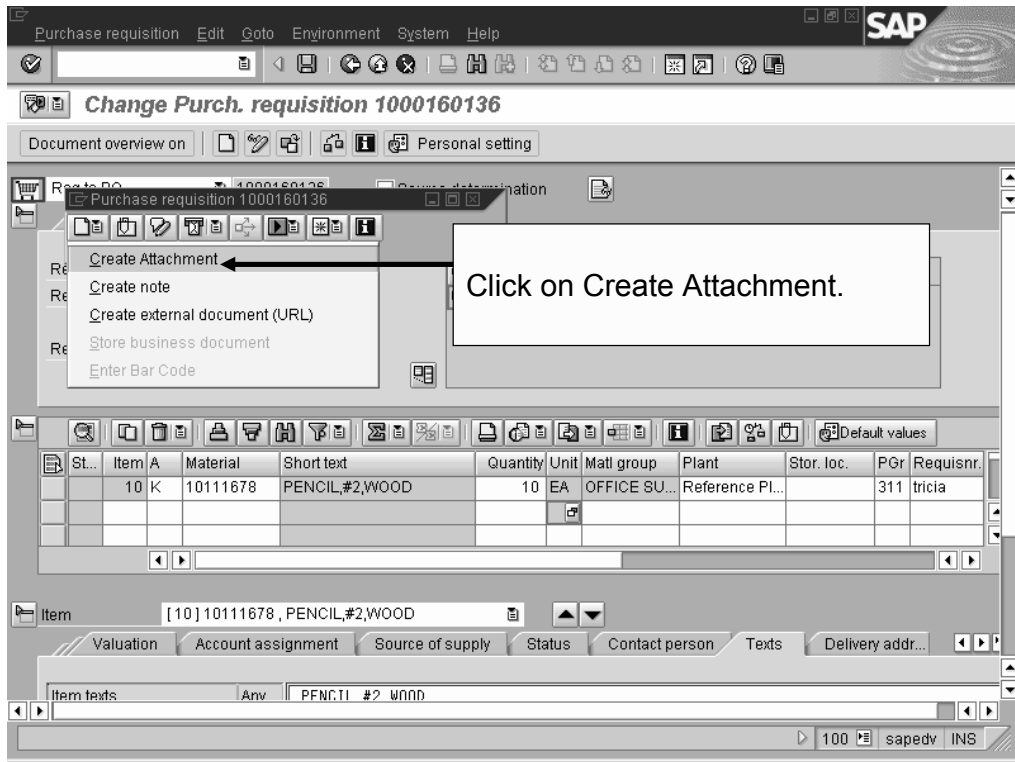
Item texts Anv PFNCIT #2 WOOD

100 sapadv INS

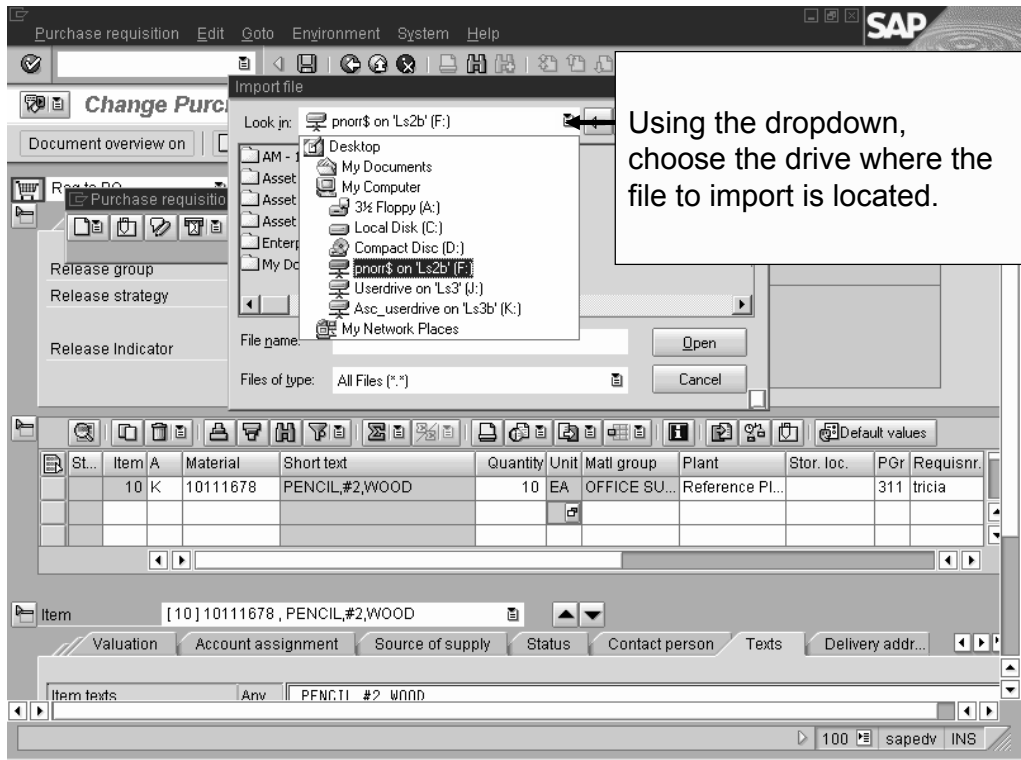
1-61



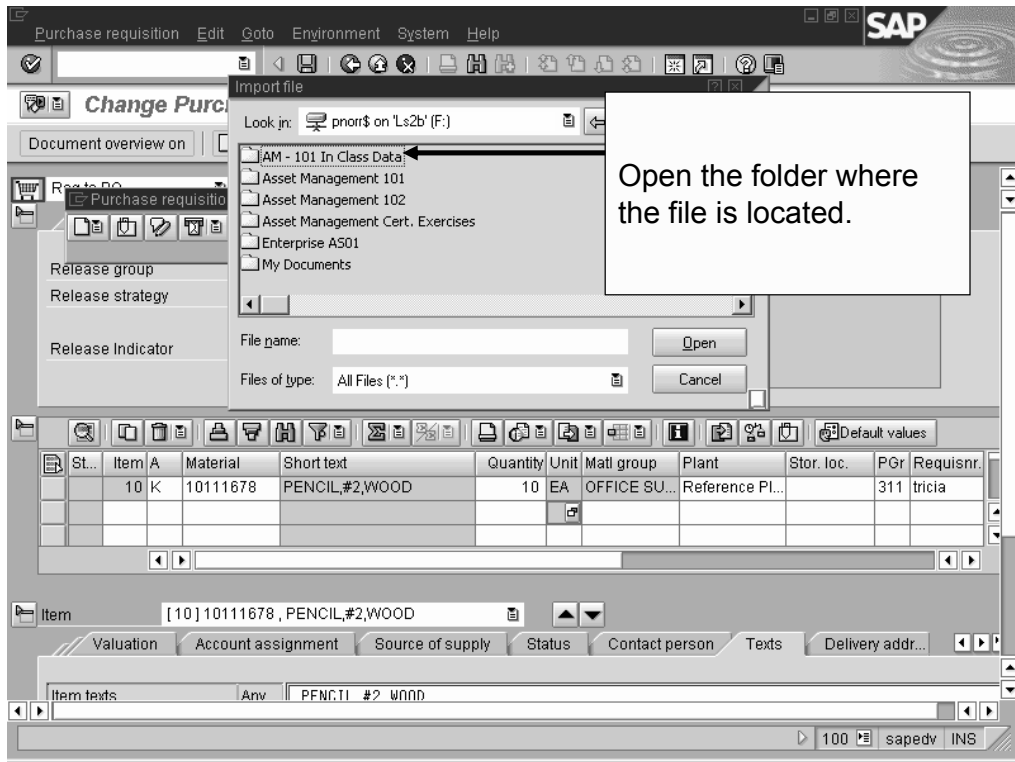
1-62



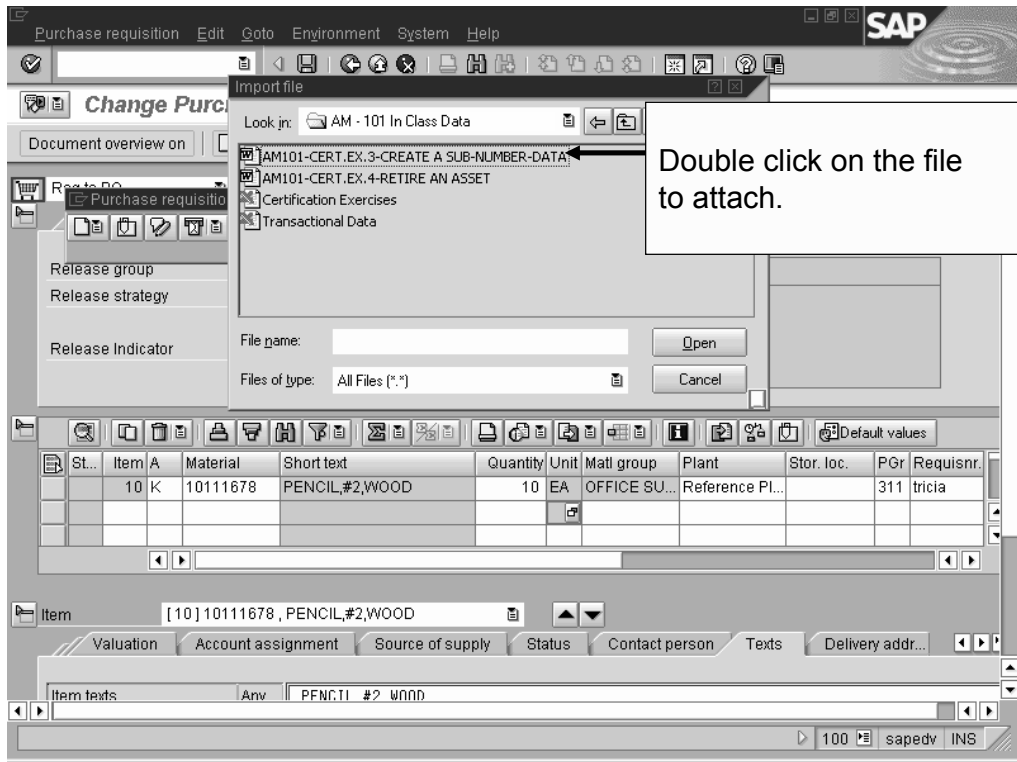
1-63



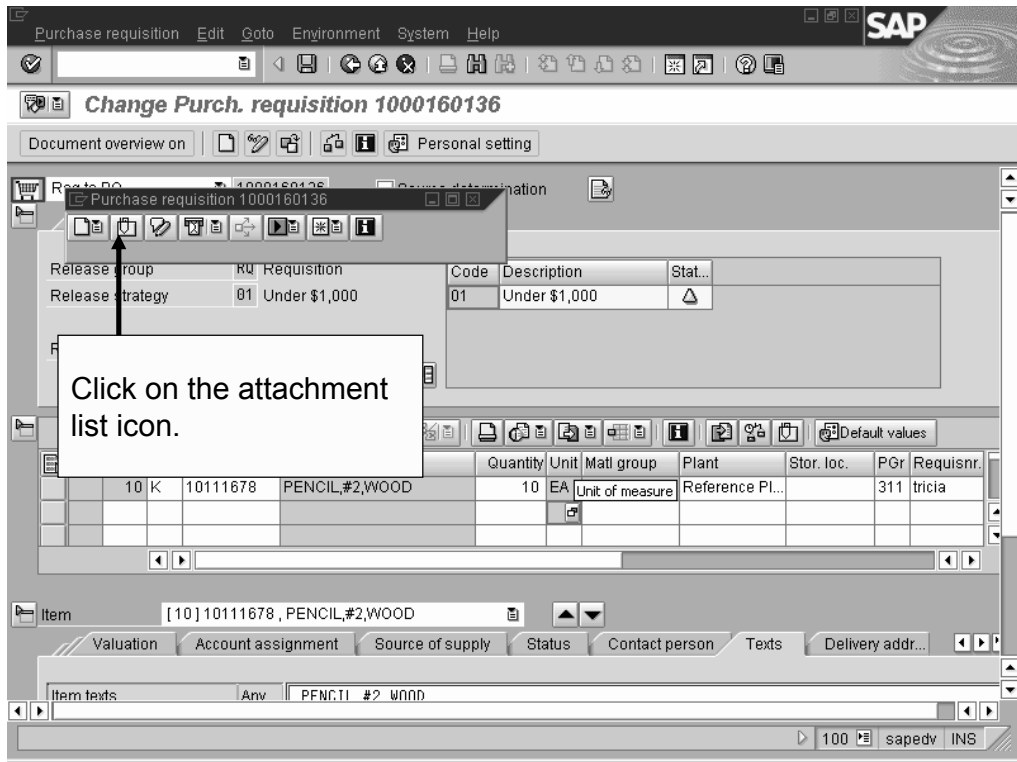
1-64



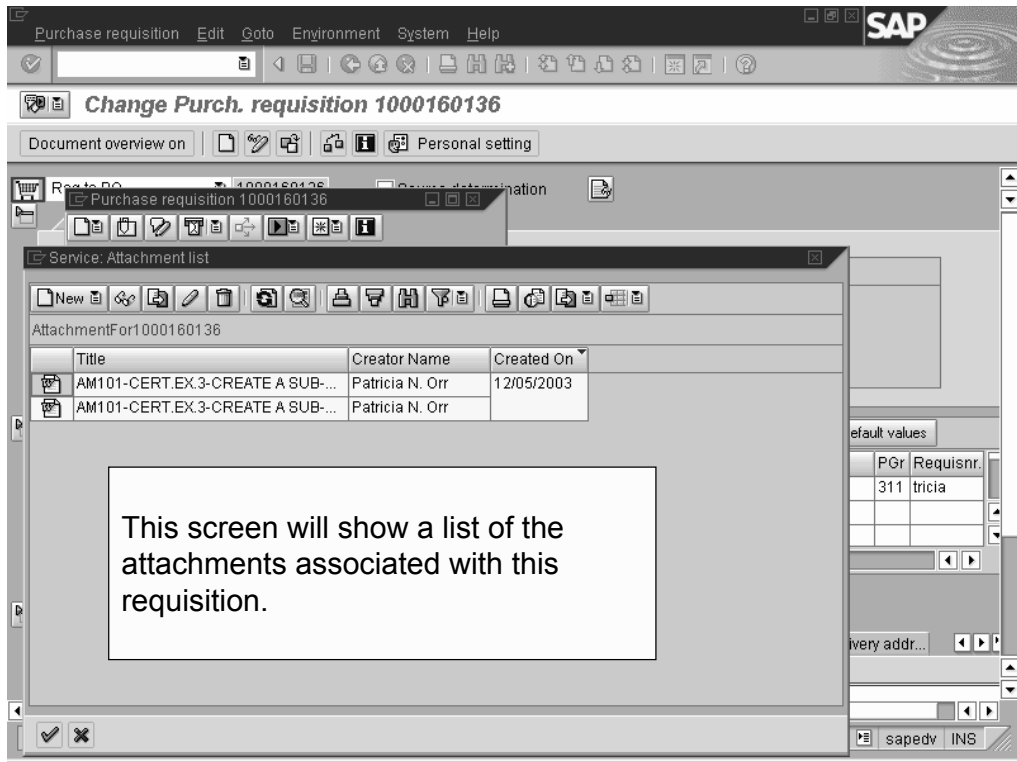
1-65



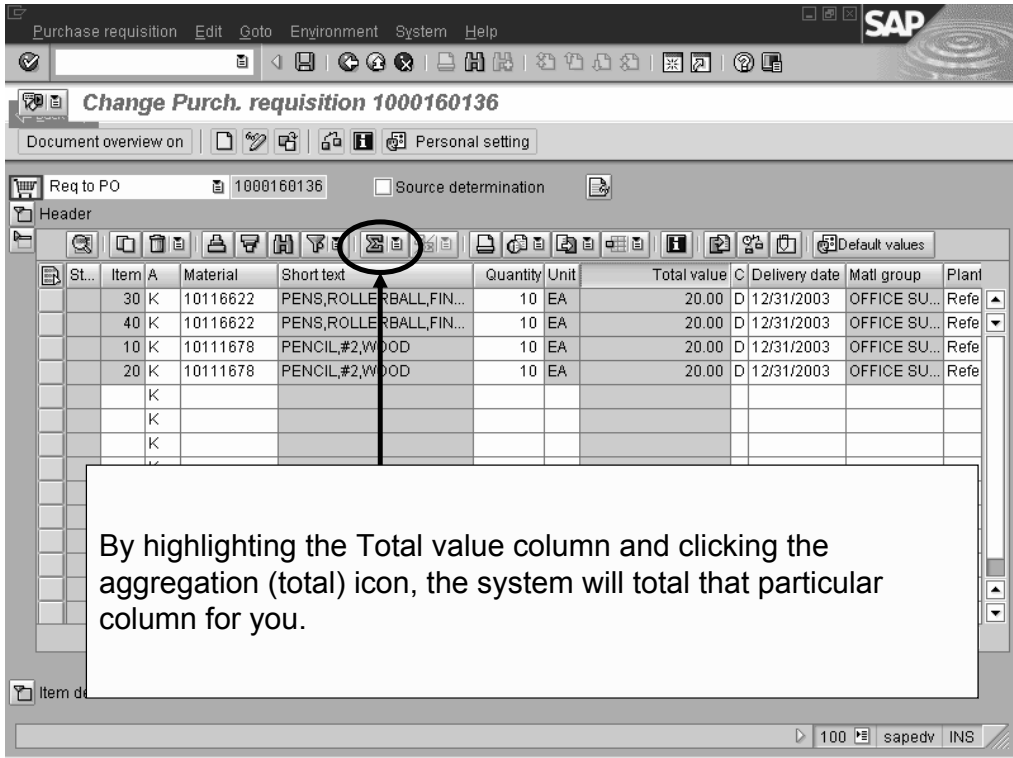
1-66



1-67



1-68



Change Purch. requisition 1000160136

Document overview on | Personal setting

Req to PO 1000160136 ☐ Source determination

Header

St...	Item A	Material	Short text	Quantity	Unit	Total value	C	Delivery date	Matl group	Plant
	30 K	10116622	PENS,ROLLERBALL,FIN...	10	EA	20.00	D	12/31/2003	OFFICE SU...	Refe
	40 K	10116622	PENS,ROLLERBALL,FIN...	10	EA	20.00	D	12/31/2003	OFFICE SU...	Refe
	10 K	10111678	PENCIL,#2,WOOD	10	EA	20.00	D	12/31/2003	OFFICE SU...	Refe
	20 K	10111678	PENCIL,#2,WOOD	10	EA	20.00	D	12/31/2003	OFFICE SU...	Refe
	K									
	K									
	K									
	K									

Item d...

100 sapdev INS

By highlighting the Total value column and clicking the aggregation (total) icon, the system will total that particular column for you.

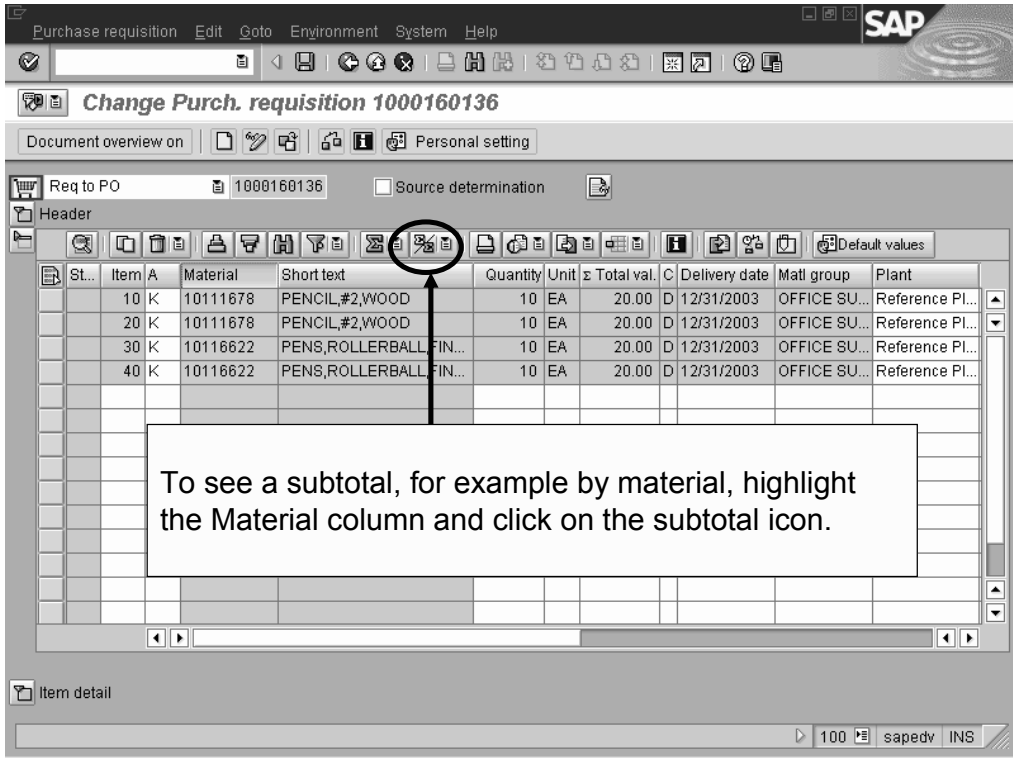
1-69

The screenshot shows the SAP 'Change Purch. requisition 1000160136' interface. The 'Document overview on' tab is active. The 'Req to PO' is 1000160136. The 'Source determination' checkbox is unchecked. The table below shows two items with a total value of 80.00.

St...	Item	A	Material	Short text	Quantity	Unit	Σ Total val.	C	Delivery date	Matl group	Plant
	30	K	10116622	PENS,ROLLERBALL,FIN...	10	EA	20.00	D	12/31/2003	OFFICE SU...	Reference Pl...
	40	K	10116622	PENS,ROLLERBALL,FIN...	10	EA	20.00	D	12/31/2003	OFFICE SU...	Reference Pl...
							80.00				

When you scroll down, you see the total of the Purchase Requisition.

1-70



Purchase requisition Edit Goto Environment System Help

Change Purch. requisition 1000160136

Document overview on Personal setting

Req to PO 1000160136 Source determination

Header

St... Item A Material Short text Quantity Unit Total val. C Delivery date Matl group Plant

10	K	10111678	PENCIL,#2,WOOD	10	EA	20.00	D	12/31/2003	OFFICE SU...	Reference Pl...
20	K	10111678	PENCIL,#2,WOOD	10	EA	20.00	D	12/31/2003	OFFICE SU...	Reference Pl...
30	K	10116622	PENS,ROLLERBALL FIN...	10	EA	20.00	D	12/31/2003	OFFICE SU...	Reference Pl...
40	K	10116622	PENS,ROLLERBALL FIN...	10	EA	20.00	D	12/31/2003	OFFICE SU...	Reference Pl...

To see a subtotal, for example by material, highlight the Material column and click on the subtotal icon.

Item detail

100 sapedv INS

1-71



Purchase requisition Edit Goto Environment System Help

Change Purch. requisition 1000160136

Document overview on Personal setting

Req to PO 1000160136 Source determination

Header

St...	Item	A	Material	Short text	Quantity	Unit	Σ	Total value	C	Delivery date	Matl group	Plant
	10	K	10111678	PENCIL,#2,WOOD	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
	20	K	10111678	PENCIL,#2,WOOD	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
			10111678					40.00				
	30	K	10116622	PENS,ROLLERBALL,FIN...	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
	40	K	10116622	PENS,ROLLERBALL,FIN...	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
			10116622					40.00				

Item detail

100 sapadv INS

Now you can see subtotals by material.
If you scroll down the total is at the bottom.

1-72



Change Purch. requisition 1000160136

Document overview on | Personal setting

Req to PO 1000160136 ☐ Source determination

Header

St...	Item	A	Material	Short text	Quantity	Unit	Σ	Total value	C	Delivery date	Matl group	Plant
	30	K	10116622	PENS,ROLLERBALL,FIN...	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
	40	K	10116622	PENS,ROLLERBALL,FIN...	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
			10116622					40.00				
	10	K	10111678	PENCIL,#2,WOOD	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
	20	K	10111678	PENCIL,#2,WOOD	10	EA		20.00	D	12/31/2003	OFFICE SU...	Refe
			10111678					40.00				
		K										
		K										
		K										
		K										
		K										
		K										
		K										
		K										

Item detail

100 | sapadv | INS

To print a requisition click on the print icon.

1-73



Purchase requisition Edit Goto Environment System Help

Change Purch. requisition 1000160136

Document overview on [Icons] Personal setting

Print ALV List

Output Device [Green Checkmark]

Number of copies

Number of pages

☒ Print all

☐ Print from page To

Report Rows Columns

Format ABAP/4 list: Default list format...

[Green Checkmark] Properties [Close] [Help]

Find your output device (printer) and green check.

100 sapdev INS

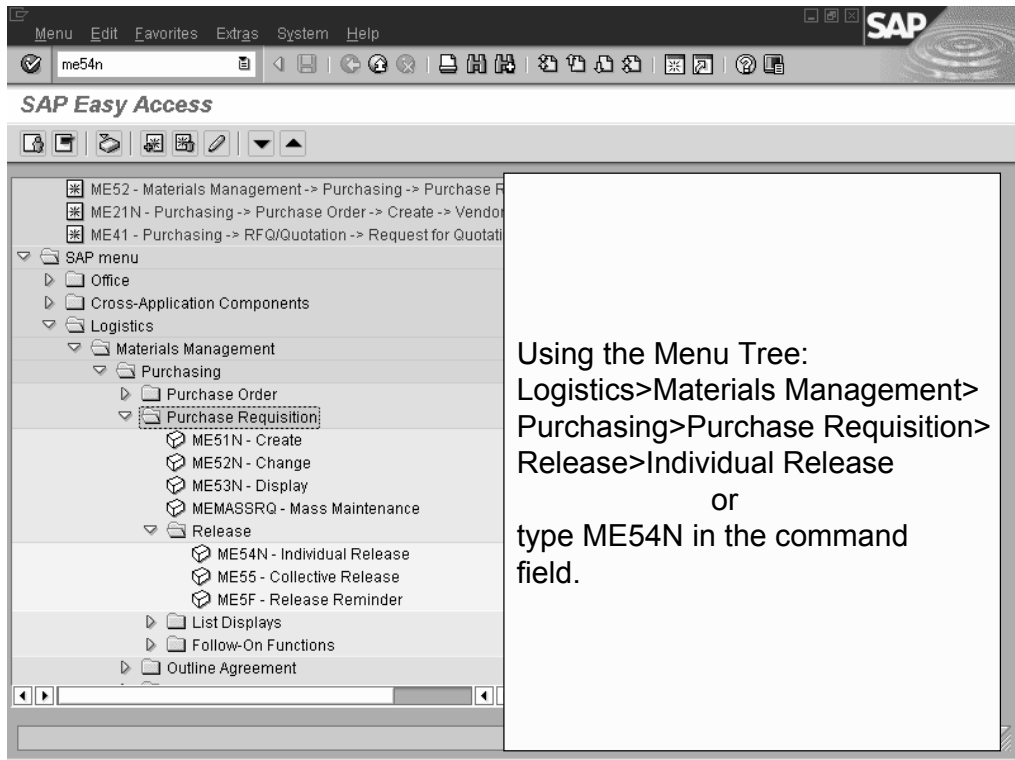
1-74



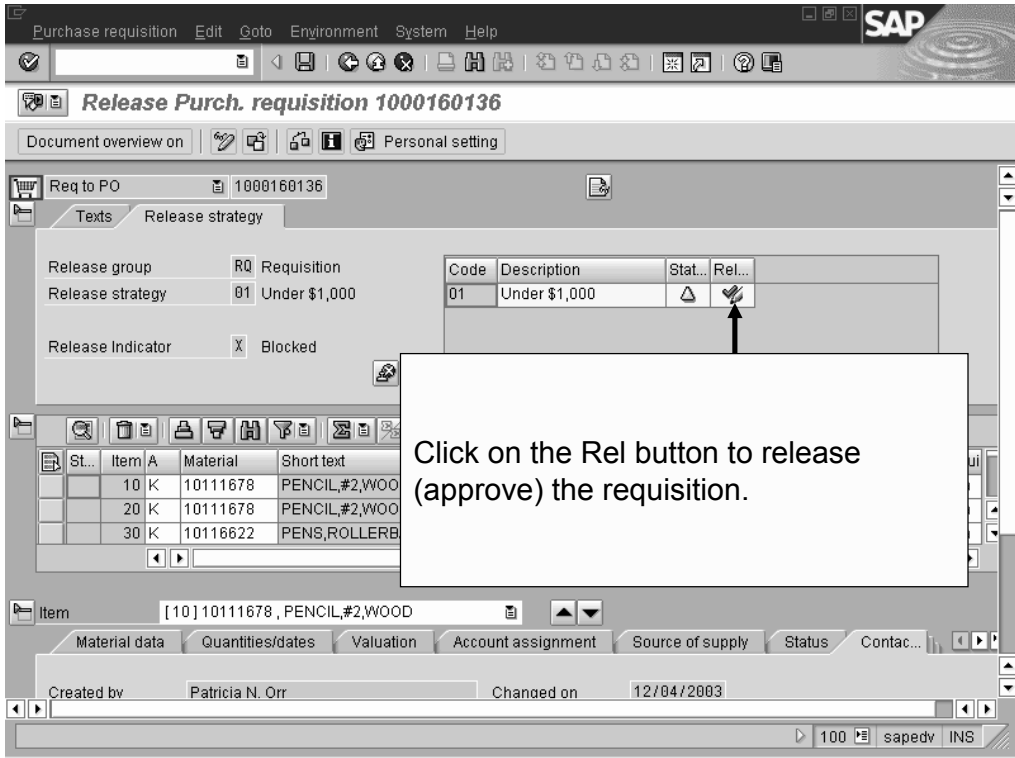
Approve a Purchase Requisition ME54N

USING THE MENU TREE GO TO
LOGISTICS>MATERIALS
MANAGEMENT>PURCHASING>
PURCHASE
REQUISITION>RELEASE>INDIVIDUAL
RELEASE

1-75




1-76



The screenshot shows the SAP interface for releasing a purchase requisition. The title bar reads "Release Purch. requisition 1000160136". The menu bar includes "Purchase requisition", "Edit", "Goto", "Environment", "System", and "Help". The toolbar contains various icons for document management. The main area is divided into several sections:

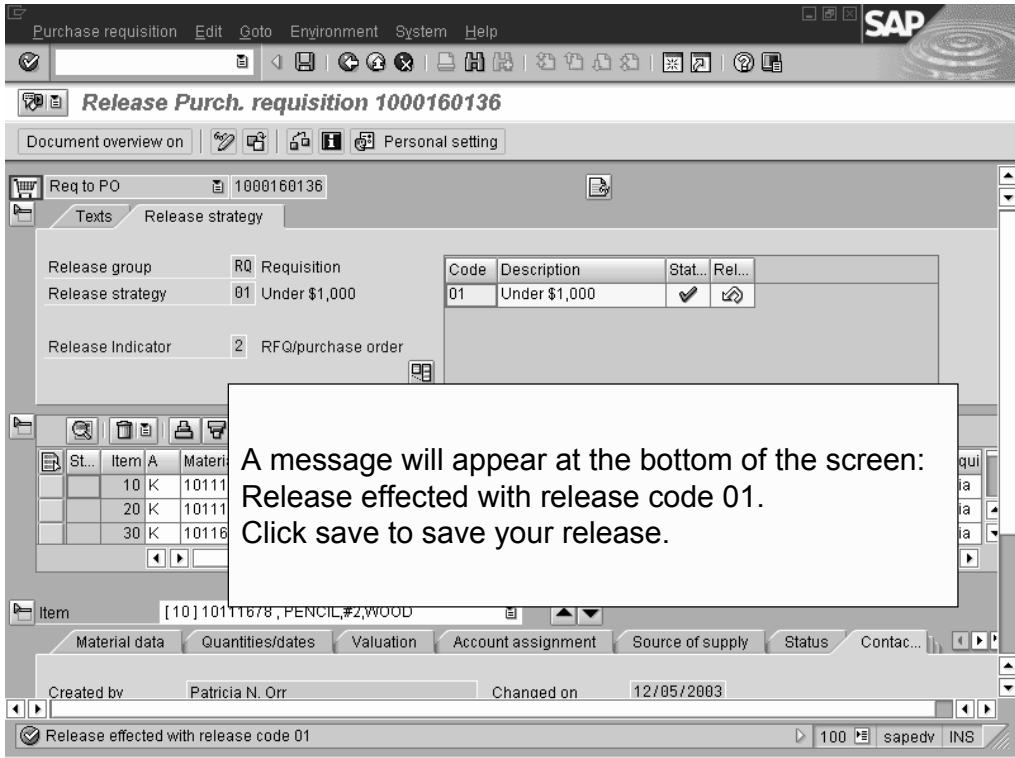
- Document overview on:** Includes icons for document overview, release, and personal settings.
- Req to PO:** Shows the requisition number "1000160136".
- Texts / Release strategy:**
 - Release group: RQ Requisition
 - Release strategy: 01 Under \$1,000
 - Release Indicator: X Blocked
- Table:**

Code	Description	Stat...	Rel...
01	Under \$1,000		
- Item List:**

St...	Item A	Material	Short text
	10 K	10111678	PENCIL,#2,WOOD
	20 K	10111678	PENCIL,#2,WOOD
	30 K	10116622	PENS,ROLLERB
- Item Details:**
 - Item: [10]10111678, PENCIL,#2,WOOD
 - Material data, Quantities/dates, Valuation, Account assignment, Source of supply, Status, Contac...
 - Created by: Patricia N. Orr
 - Changed on: 12/04/2003

A callout box with the text "Click on the Rel button to release (approve) the requisition." points to the "Rel..." button in the table.

1-77



Release Purch. requisition 1000160136

Document overview on | Personal setting

Req to PO 1000160136

Texts Release strategy

Release group	RQ Requisition	Code	Description	Stat...	Rel...
Release strategy	01 Under \$1,000	01	Under \$1,000	✓	↻

Release Indicator 2 RFQ/purchase order

St...	Item A	Material
	10 K	10111
	20 K	10111
	30 K	10116

Item [10]10111678, PENCIL, #2, WOOD

Material data Quantities/dates Valuation Account assignment Source of supply Status Contac...

Created by Patricia N. Orr Changed on 12/05/2003

Release effected with release code 01 100 sapadv INS

A message will appear at the bottom of the screen:
Release effected with release code 01.
Click save to save your release.

1-78